PARISHSTAQ GIVING STATEMENTS- TIPS AND BEST PRACTICES

PREPARATION AND AUDIT STEPS

Pushpay Giving statements have been designed to meet IRS requirements, showing only donations that are marked as tax deductible. Please ensure prior to selecting a date to generate and send your statements that you are confident in logging into the Giving software, are aware of your password, and know how to navigate to and are familiar with the Giving Statement process.

Merge Duplicates – in ChMS:

Start with the Pending Profiles, because they likely have giving history connected to them. Then move on to the Duplicate Detector and review them if you have time. Check out the Best Practices For Managing Pending Profiles, and the generic: How to Merge Duplicates in Pushpay ChMS Only merge those you absolutely know are duplicates otherwise the vendor will charge a fee to reverse the merger. You can ONLY merge profiles for the campuses in which you have permissions, if you notice a cross-campus merger, please send the name to the Diocese for merger.

Verify Gift Dates in Gift Entry – in Giving:

Within Gift Entry ALWAYS assign a default "Given On" date within the batch, so that it matches the date within your Batch Name. This will ensure that any back dated batches will be recorded correctly. Double check any batches in December prior to Depositing them. This will ensure the gift is recorded on the correct date and will show correctly in statements.

For Credit Card and ACH gifts, the gift will automatically record the time and date the gift was **processed**. This means that in order for a processed transaction to be included on a Giving Statement, it must have been given within the period the statement covers.

Ensure all gifts are Batched – in Giving:

Batches need to be marked as Deposited in Giving to show on ChMS Financial Reports. Deposit a Batch shows how to mark them all as Deposited.

Are there gifts, not in Pushpay Giving, from another source?

If there are other sources of giving, such as bank transfers, please book time with the Coaches (see end of the document) to ensure all transactions will be visible on Giving Statements and learn how to import the Gifts to ensure Giving Statements will be complete.

Confirm transaction accuracy -in Giving and ChMS

There can be a multitude of reasons why donations may need to be changed or returned to the donor. If any of your transaction needed edited, please correct them in Giving, which will now automatically correct them in the ChMS tool. Here is a link to how to correct these in Giving.

Announce Giving Statements will look different this year

Announce at Mass, via email, and include a blurb in the bulletin that Giving Statements will be emailed if the parish has their contact information. Remind parishioners to provide their current contact information- especially email address and mailing address if it changed in the past year. Emailing statements helps save the Parish time and money instead of printing and mailing. It is possible (and needed) to printed a statement for any parishioner without an email. Also, if you Pastor prefers, you can physically send statements as opposed to emailing them.

You can use the Form Template "Update My Contact Information" in ChMS for your parishioners to provide their contact information. It can be posted on the website, you can use a free QR Code generator and post it in the bulletin, and make announcements throughout Advent to ensure everyone's information is complete. A benefit of using a Form is, it will automatically update any contact information that is not already in their Profile when matching the Form Response to the Profile.

Record a video, prep an email, and write a letter

Would Father like to record a video to include in Giving Statements? If desired, a video can be included in the email thanking all givers for their generosity. The email for Giving Statements has a maximum of 10,000 characters available. Many churches choose to include a letter along with the printed Giving Statement which can be <mark>included as an attachment and allows you to compose</mark> it on parish letterhead

Test Run Giving Statements

Do a test run of Giving Statements, double-check the Church's contact information shows properly, check for duplicate donors that need to be merged, double check a weekly donor to make sure all batches are showing. Next, double check a Credit Card/ACH donor as well to make sure all looks consistent. Learning about Giving Statement Contact Details. To ensure Gifts show properly, this is based on the Fund's tax deductibility status.

RUNNING GIVING STATEMENTS

Configuring Giving Statements – within the Giving Tool

The Giving Statements feature allows you to send contribution statements for either annual, quarterly, or a custom time period. Once published, giving statements can be either emailed, or downloaded and printed for distribution or physical mail. After initially setting up the Giving Statement for this year simply Regenerate it after the 10th of January to capture all the final credit cards/ACH's donations.

Within the Giving tool go to **Giving Statements** you will see the screenshot below where you can **Create a new statement run** (needed here as we haven't generated this year's statements yet, only last year's as seen from the listing below)

You may need to **select a Campus** depending on the state of your parish's financial merger.

Next, you'll see the following screen where you will select the **Period Type: Annual** and then select the year. For this test example we're selecting **Custom** and then filling in the time frame we wish to review. (full Annual statements can't be generated till after Jan 10th, but test statements, like the one below can still be generated to prep)

Scroll down and under the **Statement Details** fill in what your **Statement Name**: Test 2025 in this scenario, along with the **Contact email address, Contact phone number,** and **Statement Amount Starting Range** (which will allow you to restrict the statements to ONLY over a certain amount if you wish)

Next, select what you wish to show on the Statement whether you wish your EIN to be built into the Statement or not and verify your physical address.

Options selected below will be included in your statements

☐ Non-cash gifts

✔ Your EIN: 39-0984038

✔ Your physical address: 101 Church St.,

Select your **Publishing Format.** We recommend printing statements by **Household** which groups all members that have given in the household together. Then click **Save and Continue.**

Publish format

○ Individuals - each community member gets a statement of only their gifts

● Household - primary and secondary household members get a statement of all the gifts for their family

Generating Giving Statements

You will see a preview of your Statements, as seen below. They have been designed to fit a Window #10 envelope if needed for mailing. Scroll down to review and at the bottom, click the **Next** button

① ———— ② ———— ③
Configure your statements   Generate your statements   Publish your statements

Generate your statements   🗑 Delete Statements

This giving statement contains example information in order to give you an idea of how your statements will look. They have been designed to fit the US Window Envelope #10. When you've finished reviewing this example, click the Next button to proceed.

You will see a popup request to generate statements, click **Generate**. The system will generate statements. If you wish, you can close this window and come back to view them once they are done. (for small parishes it may take 3-5 minutes, larger parishes will take longer)

After Generating your Statements, the screen below will show the number of statements generated and what can be sent through email or standard mail. You can also delete this statement via the upper right corner "Delete Statement" button at this time.

① ———— ② ———— ③
Configure your statements   Generate your statements   Publish your statements

Publish your statements

Generated date: Nov 24, 2025 | Total statements generated: 218 | Regenerate statements ›   🗑 **Delete Statements**

Delivery summary

✉

0
statements emailed

☁

0
statements downloaded
(92 households without email)

Next you'll be setting up the delivery method. Prior to emailing statements always double check via the downloaded statements, how they appear for a number of families and types of givers. The Diocese recommends emailing statements in order to save parishes time and money on mailings.

Set up your Delivery Method

In our Test example below the **Primary delivery method** is set to **Download Statements** and we still see the different counts of which statements can go out through email vs which need to be printed and mailed.

Click the **Download** button under the middle total number of Statements (218 in the example above) to preview each household statements and to look for duplicate donors.

In the example here we can see these are duplicate records due to the name that was used when signing up for online giving wasn't merged into the main family record within the ChMS tool. You can also open each PDF to double check that it is the same households on common last names. Go to ChMS and merge the individual. If you can't perform the merger due to the member being on a different campus, please contact the Diocese with the names for them to assist.

Preparing your Email

If you have chosen to publish your statements for households, both the primary and secondary household members will receive a copy of the household giving statement via the email to the primary email address associated with their profile. If you choose to only Download statements, the system will bypass this email setup.

The email editor will show providing you with the ability to enter in a custom email message thanking donors for their generosity and reviewing the work of the parish in the local community. This message is limited to 10,000 characters. You can also add a video link if it is hosted by Youtube or Vimeo. By entering in a link this will embed the thumbnail image of the video which is a powerful way of connecting with your parishioners.

Since Pushpay is sending emails on your behalf, the emails will be sent from a Pushpay domain. While the "From" email address cannot be modified, the "Reply-to" address is determined by the contact email address set in the original Configuration. The email subject and title are both populated based on your statement settings, but can both be edited. Be sure to include your organization name in the email subject so your donors know that the email is from you and relates to their giving, without having to open the message.

Once you start editing your custom email you can click the: **Save for Later** and come back to finish it as needed.

Once your message is composed, at the bottom, you'll have three options: **Send me a test email**, **Save for later**, and **Save and publish statements.**

We strongly recommend **Sending a test email** especially if you are using a Video URL, to ensure the URL has been configured correctly. A couple things to note:

1) The test email will not include a link to download the giving statement PDF, it will just have the button to sign in to view statements. The actual email will include both.
2) The test email will be addressed to an auto-generated name

Send and Publish your Statements

Once you're done editing your message and have tested sending it, click the **Send and Publish** statements button at the bottom of the page. You will be asked to confirm that you wish to send emails now - click the **Confirm** button to begin sending.
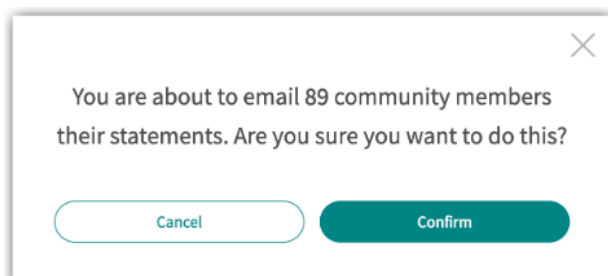
You will see a **Success!** message, once the giving statements have been successfully emailed.

Download Statements

If you have selected **Download statements** as your primary delivery method, the download panel will be displayed. Clicking the **Download All** button will prompt you to download a zip file containing all of the parish's statements. If you have a large number of statements you may have multiple zip files to download.

If you have sent statements through Email you may still need to selected **Download statements** as your secondary delivery method for those donors without email addresses.

Printing off Giving Statements within Zipped Files

Open up the Downloaded Zip file, select an option to Extract them all to a folder on your Desktop. Depending on your computer, you'll then see the folder with numerous PDF files as seen below. Test print by selecting only a couple, to verify they print correctly on your Printer.

Next, click to Select All documents in the file, then right click to print the documents. If you don't see the Print option shown, select **Show more Options** as seen here.
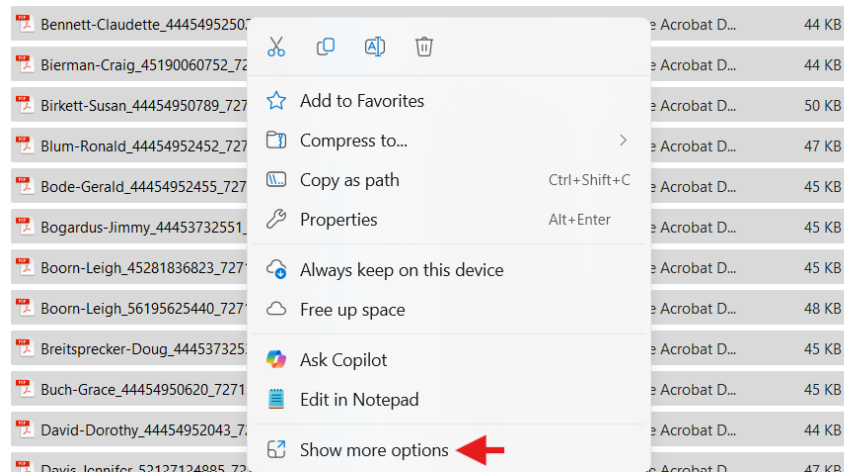

You will then have further options, look for your Printer or the ability to Print but if none is shown, next look for the ability to: **Send To** as seen below and check to see if your printer is listed. If you printer is listed, select it, format the Print and then mail your Statements.
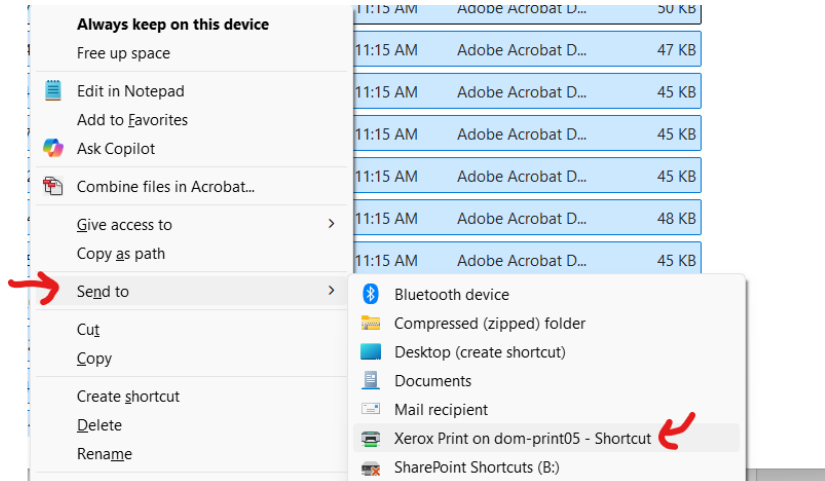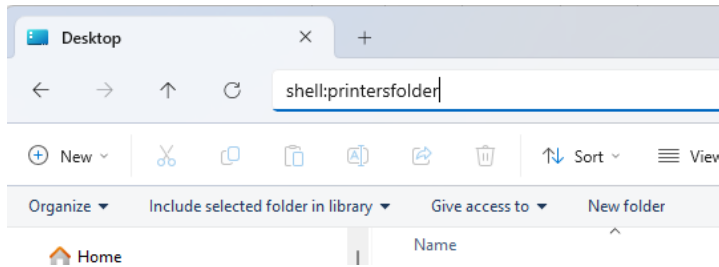

**Setting up your Printer as a Default in the Send To area:**

If your printer is NOT listed in the **Send To** area, follow the steps below to set up your Printer as a default in this area. Click in the upper Windows Explorer navigation screen as seen below.
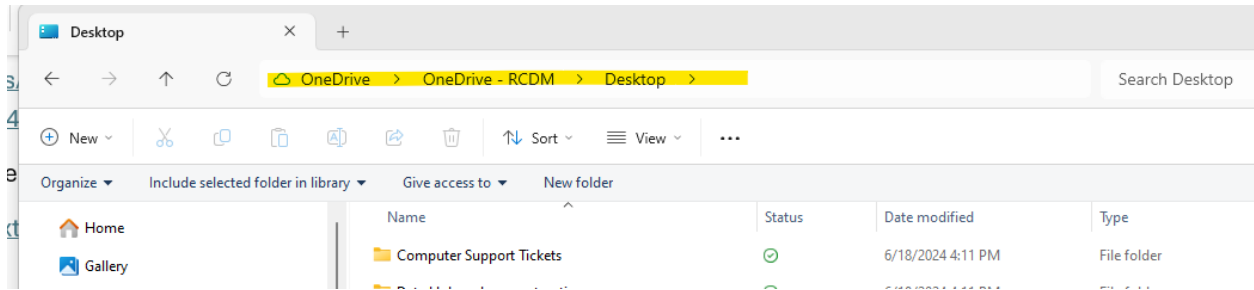
In the direction area, type **shell:printersfolder** (as seen below) and then hit Enter.


This should bring up the list of printers installed on the computer as seen below. Leave this window open.
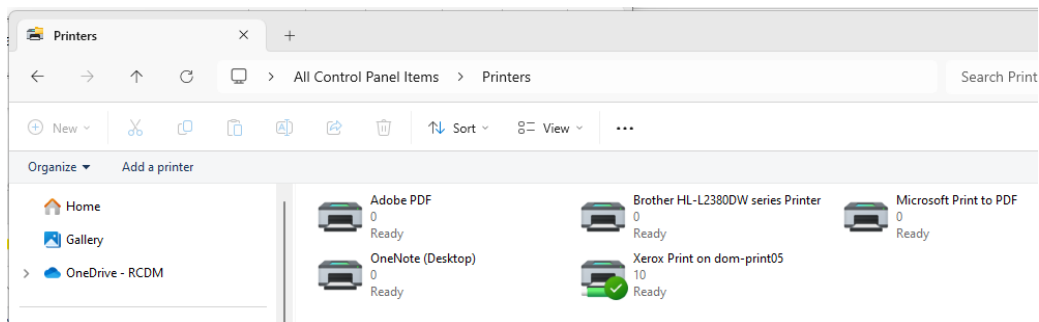
Next, open a second Windows Explorer Window (leaving the first window open). In the direction area again, type **shell:sendto** and hit Enter. This should bring up the list of 'send to items' that are your default.
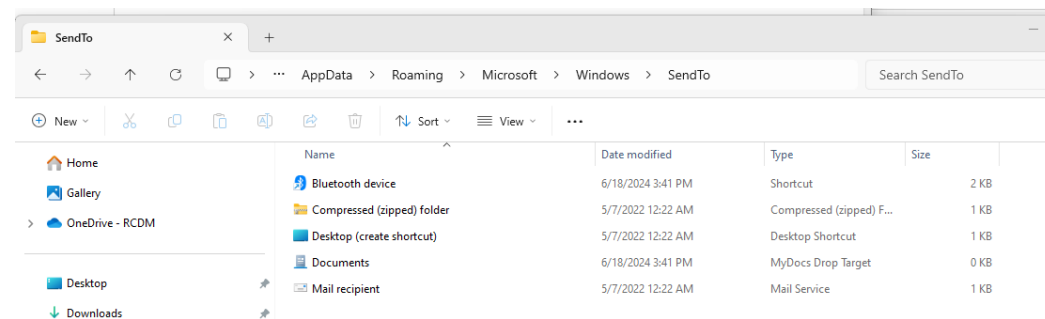
Click and drag the Default Printer icon from the initial window to the **sendto** folder window, as seen below.
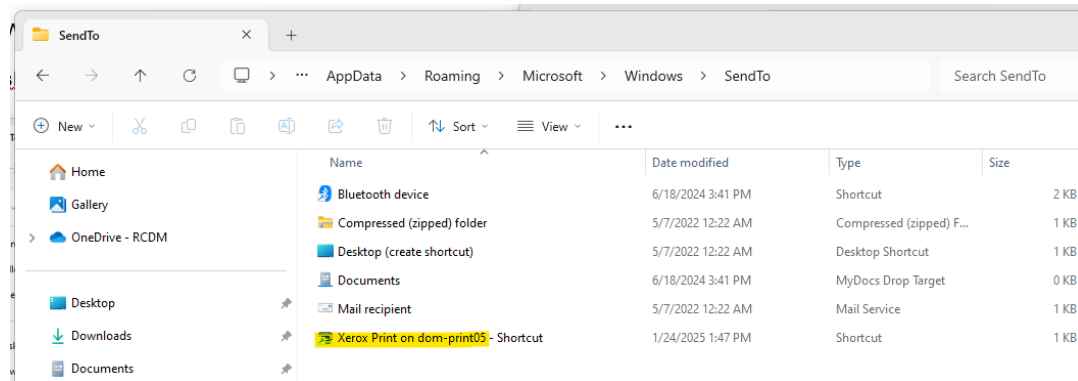
*This will make it so that when you have multiple files selected, and you right click within the **Send To** options, you will now see the default printer you wish to use within that list.*

Lastly, navigate back to the group of .PDF files you wish to print as a group. Select all the documents, right click, choose **Send To** and select your Printer to print all the documents.

Further Resources:

How to Run Giving Statements for Deceased Donors

Downloading Adobe Acrobat Reader for Free