



Before and After (New) Release 3.0.8 Billing Screen Shots

In Release 3.0.8, OnCare has made a number of enhancements to the billing functions. Following are the before and after(new) screen shots in the few areas that were changed as related to the Program Schedule Based billing.

1. BILLING SETUP

Before

>> Setup

1. [Billing setup](#)
2. [Automatic Recurring Posting setup](#)
3. [User Preferences](#)
4. [Child Schedule Templates](#)
5. [Add/Edit 3rd Party Agency](#)
6. [Classroom Setup](#)
7. [Bus Run Setup](#)

The "2. Automatic Recurring Posting setup" is now embedded in Billing Setup

New

>> Setup

1. [Billing Setup](#)
2. [User Preferences](#)
3. [Child Schedule Templates](#)

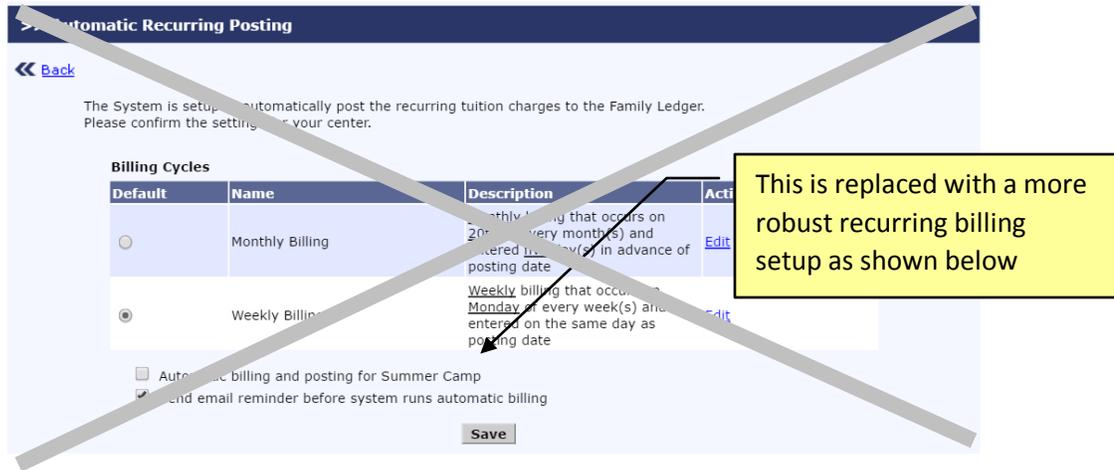
Click here to see the new options

>> Billing Setup

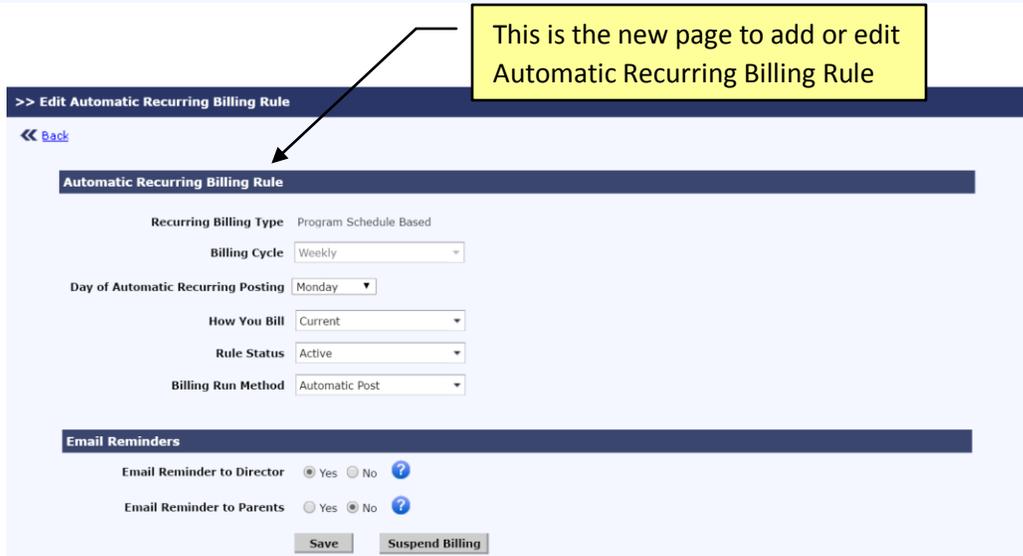
1. [Billing Items Setup](#)
2. [Billing Multiplier](#)
3. [Automatic Recurring Billing Rules](#)
4. [Tuition Increase](#)

2. AUTOMATIC RECURRING RULE SETUP

Before



New



3. ADD BILLING ITEMS

Before

[Main Menu](#) [Setup](#) [Reports](#) [Functions](#)

>> Billing Setup

[Back](#)

| Transaction Type | Description | Standard Amount | G/L Account | G/L Account Description | Status |
|------------------|-------------|-----------------|--------------|-------------------------|----------|
| Select here... ▼ | | \$ | Select Her ▼ | | Active ▼ |

View Active ▼

| No. | Transaction Type | Description | Standard Amount | G/L Account No | G/L Description | Status | Action |
|-----|------------------|--------------|-----------------|----------------|--------------------|--------|----------------------|
| 1 | Tuition Charge | A KOnly/3Day | \$ 210.26 | 40150 | Tuition-School Age | Active | Edit |
| 2 | Tuition Charge | A KOnly/5Day | \$ 272.82 | 40150 | Tuition-School Age | Active | Edit |

This "Add Billing Item" is now hidden

New

[Main Menu](#) [Setup](#) [Reports](#) [Functions](#)

>> Billing Items Setup

[Back](#)

To add new billing item, click here

[Add New](#)

Setup billing items (tuition charges, other charges, credits and payment) for your center below: View Active ▼

| No. | Transaction Type | Description | Standard Amount | G/L Account No | G/L Description | Status | Action |
|-----|------------------|--------------|-----------------|----------------|--------------------|--------|----------------------|
| 1 | Tuition Charge | A KOnly/3Day | \$ 210.26 | 40150 | Tuition-School Age | Active | Edit |
| 2 | Tuition Charge | A KOnly/5Day | \$ 272.82 | 40150 | Tuition-School Age | Active | Edit |

New pop up window to add or edit billing item

>> Billing Items Setup

Add / Edit Billing Item

[Back](#)

Setup billing items (tuition charges, other charges, credits and payment) for your center below: View Active ▼

| No. | Transaction Type | Description | Standard Amount | G/L Account | G/L Account Description | Status | Action |
|-----|------------------|--------------|-----------------|-------------|-------------------------|--------|----------------------|
| 1 | Tuition Charge | A KOnly/3Day | \$ 210.26 | 40150 | Tuition-School Age | Active | Edit |
| 2 | Tuition Charge | A KOnly/5Day | \$ 272.82 | 40150 | Tuition-School Age | Active | Edit |
| 3 | Tuition Charge | | | | | Active | Edit |
| 4 | Tuition Charge | | | | | Active | Edit |
| 5 | Tuition Charge | | | | | Active | Edit |

Transaction Type: Select Transaction Type ▼

Description:

Standard Amount: \$0.00

G/L Account: ▼

G/L Account Description:

Status: Active ▼

4. CHILD TUITION SECTION

Before

Child Tuition [Add New Row](#)

Billing Cycle:

| Ledger Type | Transaction Type | Billing / Credit Description | Amount / Credit % | Comments | Start Date | End Date | Action |
|-------------|------------------|------------------------------|-------------------|--------------|------------|----------|--|
| Sponsor | Tuitioncharge | Threes-FD/3Day | 262.56 | Silas Burton | 08/31/2015 | | Edit Delete Add % Discount |
| | | Employee Discount | 100.0% | Silas | 08/31/2015 | | Edit Delete |

New

Child Tuition [Add New Billing](#)

Any billing item added here in the Child Tuition section will be used for Automatic Recurring Billing.

Program Schedule Based

Billing Cycle: Weekly [Change Billing Cycle](#)

| Ledger Type | Transaction Type | Billing / Credit Description | Amount / Credit % | Comments | Start Date | End Date | Status | Action |
|-------------|------------------|------------------------------|-------------------|--------------|------------|----------|--------|--|
| Sponsor | Tuition Charge | Threes-FD/3Day | 262.56 | Silas Burton | 08/31/2015 | | Active | Edit Delete Add % Discount |
| | | Employee Discount | 100.0% | Silas | | | | Edit Delete |

Note: A yellow callout box points to the 'Change Billing Cycle' link with the text: 'To change Billing Cycle, click here. Will be prompted with a pop up as shown below.'

Child Tuition [Add New Billing](#) [View History](#)

Any billing item added here in the Child Tuition section will be used for Automatic Recurring Billing.

Program Schedule Based

Billing Cycle: Weekly [Change Billing Cycle](#)

Change Billing Cycle

Billing Cycle:

| Ledger Type | Transaction Type | Billing / Credit Description | Amount / Credit % | Comments | Start Date | End Date | Status | Action |
|-------------|------------------|------------------------------|-------------------|--------------|------------|----------|--------|--|
| Sponsor | Tuition Charge | PS-FD/5Day | 184.62 | Colton Simms | 01/07/2013 | | Active | Edit Delete Add % Discount |
| | | Cash Discount | 2.5% | Colton | | | | Edit Delete |

5. CHILD TUITION – VIEW HISTORY

Before

Child tuition history was shown on the child tuition section

Child Tuition [Add New Row](#)

Billing Cycle: Weekly

| Ledger Type | Transaction Type | Billing / Credit Description | Amount / Credit % | Comments | Start Date | End Date | Status | Action |
|-------------|------------------|------------------------------|-------------------|--------------|------------|------------|--------|--|
| Sponsor | Tuitioncharge | Infants-FD/3Day | 147.69 | Colton Simms | 01/04/2013 | | Active | Edit Delete Add % Discount |
| | | Cash Discount | 2.5% | Colton | | 01/04/2013 | | Edit Delete |
| Sponsor | Tuitioncharge | PS-FD/5Day | 184.62 | Colton Simms | 01/07/2013 | | Active | Edit Delete Add % Discount |
| | | Cash Discount | 2.5% | Colton | | 01/07/2013 | | Edit Delete |

New

Child tuition history is now hidden. To view history, click here and history will be shown in a different window.

Child Tuition [Add New Billing](#) [View History](#)

Any billing item added here in the Child Tuition section will be used for Automatic Recurring Billing.

Program Schedule Based

Billing Cycle: Weekly [Change Billing Cycle](#)

| Ledger Type | Transaction Type | Billing / Credit Description | Amount / Credit % | Comments | Start Date | End Date | Status | Action |
|-------------|------------------|------------------------------|-------------------|--------------|------------|----------|--------|--|
| Sponsor | Tuition Charge | PS-FD/5Day | 184.62 | Colton Simms | 01/07/2013 | | Active | Edit Delete Add % Discount |
| | | Cash Discount | 2.5% | Colton | | | | Edit Delete |

View History X

Program Schedule Based - Weekly

| Ledger Type | Transaction Type | Billing / Credit Description | Amount / Credit % | Comments | Start Date | End Date | Status |
|-------------|------------------|------------------------------|-------------------|--------------|------------|------------|--------|
| Sponsor | Tuition Charge | Infants-FD/3Day | 147.69 | Colton Simms | | 01/04/2013 | Active |
| | | Cash Discount | 2.5% | Colton | | | |

6. FAMILY ACCOUNT LEDGER

Before

Show Ledger Hide Void Post Ledger Item ?

| Ledger | Posting Date | Check # | Description | Comments | Child Name | Charges | Credit | Balance | Action |
|---------|--------------|---------|-------------------|-----------------------|------------|-----------|-----------|---------------------|----------------------|
| Sponsor | 04/25/2016 | | Employee Discount | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 04/25/2016 | | Employee Discount | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| Sponsor | 05/02/2016 | | PK-FD/5Day | Avery Burton | Avery | \$ 317.95 | | \$ 317.95 | Void |
| Sponsor | 05/02/2016 | | Threes-FD/3Day | Silas Burton | Silas | \$ 262.56 | | \$ 580.51 | Void |
| Sponsor | 05/02/2016 | | Employee Discount | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 05/02/2016 | | Employee Discount | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| Sponsor | 05/09/2016 | | PK-FD/5Day | Avery Burton | Avery | \$ 317.95 | | \$ 317.95 | Void |
| Sponsor | 05/09/2016 | | Threes-FD/3Day | Silas Burton | Silas | \$ 262.56 | | \$ 580.51 | Void |
| Sponsor | 05/09/2016 | | Employee Discount | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 05/09/2016 | | Employee Discount | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| Sponsor | 05/16/2016 | | PK-FD/5Day | Avery Burton | Avery | \$ 317.95 | | \$ 317.95 | Void |
| Sponsor | 05/16/2016 | | Threes-FD/3Day | Silas Burton | Silas | \$ 262.56 | | \$ 580.51 | Void |
| Sponsor | 05/16/2016 | | Employee Discount | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 05/16/2016 | | Employee Discount | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| | | | | | | | | Today's Bal. | \$ 0.00 |

New

Show Ledger Hide Void Post Ledger Item ?

A new Billing Period column is added

| Ledger | Posting Date | Check # | Description | Billing Period | Comments | Child Name | Charges | Credit | Balance | Action |
|---------|--------------|---------|-------------------|-------------------------|-----------------------|------------|-----------|---------------------|----------------|----------------------|
| Sponsor | 04/25/2016 | | Employee Discount | | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 04/25/2016 | | Employee Discount | | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| Sponsor | 05/02/2016 | | PK-FD/5Day | | Avery Burton | Avery | \$ 317.95 | | \$ 317.95 | Void |
| Sponsor | 05/02/2016 | | Threes-FD/3Day | | Silas Burton | Silas | \$ 262.56 | | \$ 580.51 | Void |
| Sponsor | 05/02/2016 | | Employee Discount | | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 05/02/2016 | | Employee Discount | | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| Sponsor | 05/09/2016 | | PK-FD/5Day | 05/09/2016 - 05/15/2016 | Avery Burton | Avery | \$ 317.95 | | \$ 317.95 | Void |
| Sponsor | 05/09/2016 | | Threes-FD/3Day | 05/09/2016 - 05/15/2016 | Silas Burton | Silas | \$ 262.56 | | \$ 580.51 | Void |
| Sponsor | 05/09/2016 | | Employee Discount | 05/09/2016 - 05/15/2016 | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 05/09/2016 | | Employee Discount | 05/09/2016 - 05/15/2016 | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| Sponsor | 05/16/2016 | | PK-FD/5Day | 05/16/2016 - 05/22/2016 | Avery Burton | Avery | \$ 317.95 | | \$ 317.95 | Void |
| Sponsor | 05/16/2016 | | Threes-FD/3Day | 05/16/2016 - 05/22/2016 | Silas Burton | Silas | \$ 262.56 | | \$ 580.51 | Void |
| Sponsor | 05/16/2016 | | Employee Discount | 05/16/2016 - 05/22/2016 | Avery - Audrey Burton | Avery | | \$ 317.95 | \$ 262.56 | Void |
| Sponsor | 05/16/2016 | | Employee Discount | 05/16/2016 - 05/22/2016 | Silas | Silas | | \$ 262.56 | \$ 0.00 | Void |
| | | | | | | | | Today's Bal. | \$ 0.00 | |

Note:

In addition to **Program Schedule based billing** changes described above, Release 3.0.8 also added the new **Attendance based billing** which include before care, after care, drop-in care, early drop-off and late pick-up automatic billing. If you are interested to learn more, please contact support@oncare3.com.