



Automatic TAP Processing

User Guide

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Contents

1.	What is The Purpose	2
2.	Enable Automatic TAP Processing.....	2
3.	Setup Automatic TAP Processing Rule	5
4.	Manage Family Level Automatic TAP Processing.....	7

1. What is The Purpose

The default setting for TAP processing is **manual review and submit**. Once you are comfortable with the TAP processing, you have the option to turn on the Automatic TAP Processing which will process TAP automatically based on the rules you set.

This user guide describes the Automatic TAP Processing Setup steps and how it works.

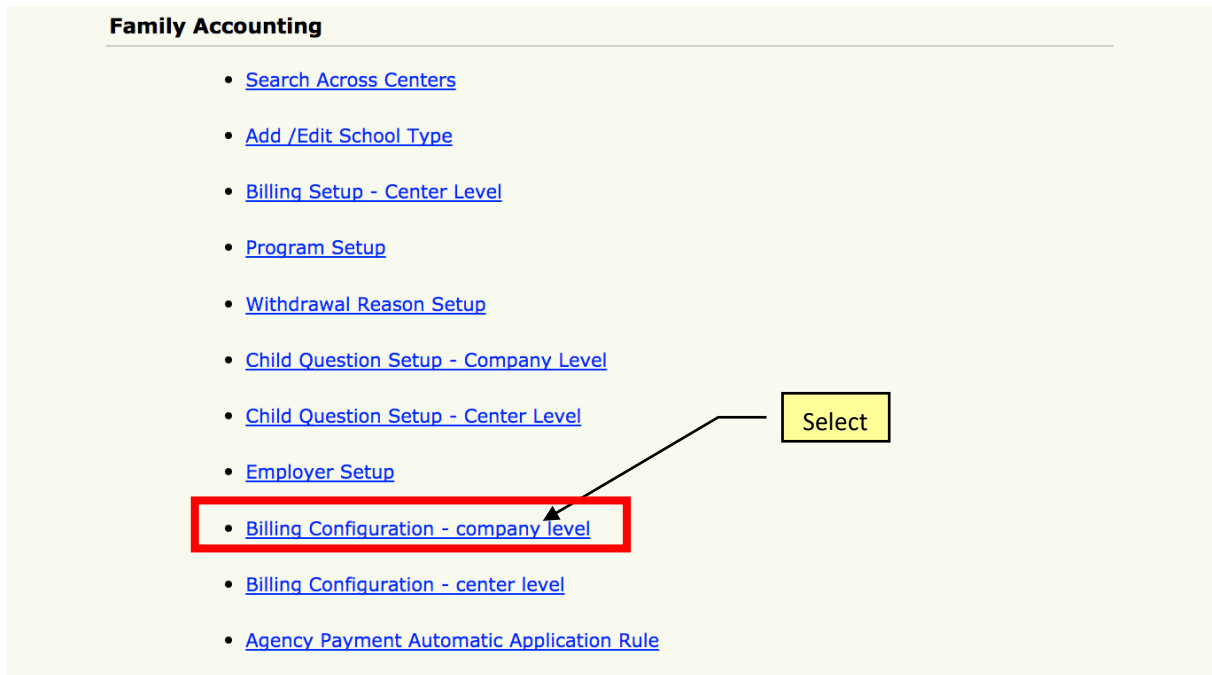
2. Enable Automatic TAP Processing

To enable Automatic TAP Processing, you have to do it in two steps. First you enable at the company level, then at the individual center level.

Note: Automatic TAP Processing can be configured at the center level. For multi-site operators, you can choose to enable Automatic TAP Processing center by center, i.e. you don't have to enable this function for ALL center at the same time.

First you should enable the function at the company level.

Administrative Functions -> Billing Configuration – company level → Automatic TAP Processing



>> Billing Configuration - company level

[<< Back](#)

Please configure the applicable billing setup for your company below:

Billing Type ☒ Program Schedule Based ☐ Attendance Based ☐ No School (Childcare Only) Billing

Billing Cycle ☒ Monthly ☒ Weekly

Pro-Rated Billing ☐ Monthly ☐ Weekly

Posting Type ☒ Automatic Post ☐ Review Before Post

Automatic TAP Processing ☒ Yes ☐ No

Payment Cycle ☒ Monthly ☐ Weekly

Child Schedule Type ☒ Regular Schedule ☐ Drop-In Schedule

Schedule ☒ Detailed Schedule ☐ Short Schedule ☐ Program Based Detailed Schedule

Billing Multiplier ☒ Monthly ☐ Weekly

Invoice ☐ Generate Invoices ☐ Process Payments based on Invoice ☐ Process Late Payments based on Invoice

Save

Make proper selection here

In the company level configuration screen, please

- Select “Yes’ for Automatic TAP Processing.
- Check the box for Payment Cycle as appropriate for this center.

As indicated above, Automatic TAP Processing can be configured at the center level. For multi-site operators, you can choose to enable Automatic TAP Processing center by center, i.e. you don’t have to enable this function for ALL center at the same time. To enable Automatic TAP Processing at the center level, please following the steps below:

Administrative Functions -> Billing Configuration – Center level → Automatic TAP Processing

Family Accounting

- [Search Across Centers](#)
- [Add /Edit School Type](#)
- [Billing Setup - Center Level](#)
- [Program Setup](#)
- [Withdrawal Reason Setup](#)
- [Child Question Setup - Company Level](#)
- [Child Question Setup - Center Level](#)
- [Employer Setup](#)
- [Billing Configuration - company level](#)
- [Billing Configuration - center level](#)
- [Agency Payment Automatic Application Rule](#)

Select this

>> Billing Configuration - center level

[<< Back](#)

Please configure the applicable billing setup for your center below:

Billing Type ☒ Program Schedule Based

Billing Cycle ☒ Monthly ☐ Weekly

Pro-Rated Billing ☐ Monthly

Posting Type ☒ Automatic Post

Automatic TAP Processing ☒ Yes ☐ No

Payment Cycle ☒ Monthly

Child Schedule Type ☒ Regular Schedule

Schedule ☒ Detailed Schedule ☐ Short Schedule ☐ Program Based Detailed Schedule

Billing Multiplier ☒ Monthly

Monthly Maximum ☐ Yes ☒ No

Invoice

Save

3. Setup Automatic TAP Processing Rule

Once you have enabled Automatic TAP processing for a center, you will notice that a new link is shown on the TAP section: Automatic TAP Processing.

>> Online Tuition Payment

Tuition Auto Pay (TAP)

TAP allows the Director to have total control over the tuition payment online.

1. [Process TAP Payment based on Ledger Balance](#)
2. [Process TAP Payment For Family](#)
3. [Review Status of Submitted TAP Batches](#)
4. [Automatic TAP Processing](#)

Tuition Pay Direct (TPD)

TPD provides the parents the option to pay their tuition online. Director can review payment status and remind parents to pay on time.

1. [Review TPD Payment Status](#)

Online Payment Enrollment

Total Active Families	138
Total Active Payors	143
Total Active Payors Enrolled in TAP	67
Total Active Payors Enrolled in TPD	63
Total Active Payors Not Enrolled	13

[Online Tuition Payment Enrollment](#)

To setup Automatic TAP Processing rule, click on the link and then click on “Add New”

>> Automatic TAP Processing

[Back](#) [Add New](#)

Automatic TAP Processing will run between 4:00 PM EST and 5:00 PM EST.

Setup Automatic TAP Recurring payment rules to process the TAP payments and post it to the account ledgers.

You should create an Automatic TAP Processing rule for each payment cycle/frequency as applicable.

>> Add Automatic TAP Processing Rule

[Back](#)

Automatic TAP Processing will run between 4:00 PM EST and 5:00 PM EST.

Select Payment Frequency Weekly

Day of Automatic Payment Processing MONDAY

Email receipt to Parent ☐ Yes ☒ No

Rule Status Active

Save

>> Add Automatic TAP Processing Rule

[Back](#)

Automatic TAP Processing will run between 4:00 PM EST and 5:00 PM EST.

Select Payment Frequency Monthly

Date of Automatic Payment Processing 1

Email receipt to Parent ☐ Yes ☒ No

Rule Status Active

Save

Once you have added the rule you can view and edit the rule.

The Automatic TAP Processing Rule determines the automatic TAP for each payment cycle, i.e. If ONLY monthly payment cycle is enabled for a center, only one setting for monthly is shown.

>> Automatic TAP Processing

[Back](#)

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Automatic TAP Processing Rule

Payment Cycle	Payment Date / Day	Payment Processing		Status	Action
		Last Processed Date	Upcoming Processing Date		
Monthly	1st of Every Month	01/01/2018	02/01/2018	Active	Edit

Pay attention to the cut-off time stated here

4. Manage Family Level Automatic TAP Processing

When Automatic TAP Processing is enabled for a center, you will notice 2 new fields in the “Payment Info” section of the Parent Information.

Family Info

Family Status: Active
Ledger Type: Single
Email Preference: Email Both

Family Type: Subsidized, Summer camp, Drop-in, Full time, Part time

Payment Info

Automatic TAP Processing: Yes
Payment Frequency: Monthly

Online Payment: TAP-Card

By default, ALL enrolled TAP families will have the Automatic TAP Processing flag set to “Yes,” i.e. the family will be included in the Automatic TAP Processing.

In special cases, you might have payment plans worked out with a few families which mean you need to handle the TAP processing manually. To do that, you would change the Automatic TAP processing for that family to “No.”

For all TAP families where Automatic TAP Processing are setup to “No”, you can continue to process their TAP payment manually by going to “1. Process TAP Payment based on Ledger Balance”

>> Online Tuition Payment

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1. **Process TAP Payment based on Ledger Balance**
2. Process TAP Payment For Family
3. Review Status of Submitted TAP Batches
4. Automatic TAP Processing

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[Online Tuition Payment Enrollment](#)