



Program Enrollment Recurring Billing

(Part 2 of 2)

User Guide

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1. What is The Purpose

This user guide is part 2 of 2 parts Program Enrollment. The steps outline in this user guide is intended for center director to enroll or “Add New Program” for a child which will assign a child schedule and setup recurring billing for that child.

Note: This user guide assumes that Program Enrollment Setup (Part 1) is done already for your center, typically with the help from the OnCare implementation team. For more information about Program Enrollment Setup, please refer to the separate “**Program Enrollment Setup user guide.**”

2. Setup a Child for Program Enrollment Recurring Billing

Under the OnCare Program Enrollment flow, there are 3 ways you can manage your enrollment in OnCare as shown below:



This user guide covers **method one** which is to enroll a child whose record is already added in the system by the center director.

To learn more about method 2 and 3, please refer to Program Enrollment Setup user guide.

By add a new program to a child, the system will assign a child schedule and setup recurring billing for that child.

To setup a child for Program Enrollment Recurring Billing, click on “Program & Billing” and then click on “Add New Program” as shown below:



Following the steps below to add the appropriate program to a child:



Note: If you are doing this as part of data migration from another system and you do not have the exact enrollment date, it is recommended that you use a fixed date (e.g. today’s date) for the child enrollment date to signify that all the children with this date are migrated from another system.



Add/Edit Program

Child's Date of Birth 07/25/2016

Enrollment Start Date 03/31/2019

Age at the time of Enrollment 2.8 Years (Preschool 2 Years - 3 Years)

Select Age Group Infant Toddler Preschool
 Pre-K School Age ACA 4s

Select a Program

Days Offered Mon Tue Wed Thu Fri

Time 08:00 AM - 06:00 PM

Billing Cycle

Fee

Select the billing cycle for the child and the standard tuition fee for that program will be shown. User can edit the tuition fee as needed.

Add/Edit Program

Child's Age at the time of Enrollment 2.8 Years **Age Group** Preschool

Enrollment Start Date 03/31/2019

Selected Program Preschool-Full Day-5 Days **Fee** \$980.00 (Monthly)

Days Offered M,Tu,W,Th,F **Program Timings** 08:00 AM - 06:00 PM

Confirm and Save

When the program is saved, you will notice the **child schedule** and program enrollment based **recurring billing** are automatically assigned.

Child Name
Michael Young

Child Program & Schedule

Child Program [Add New Program](#)

Program Name	Days Offered	Start Date	End Date	Action
Preschool-Full Day-5 Days	M,Tu,W,Th,F	03/31/2019	06/21/2019	Edit Delete

Day	Time In	TimeOut	Total Hrs	Classroom
Mon	08:00 am	06:00 pm	10.00	Dandelions
Tue	08:00 am	06:00 pm	10.00	Dandelions
Wed	08:00 am	06:00 pm	10.00	Dandelions
Thu	08:00 am	06:00 pm	10.00	Dandelions
Fri	08:00 am	06:00 pm	10.00	Dandelions
Grand Total			50.00	

Child Schedule added automatically

Automatic Recurring Billing [Add New Billing](#)

With Program Based Billing, the tuition associated with the above program is automatically assigned.

Program Billing

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

Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date		Status	Action
						Start	End		
Sponsor	Tuition Charge	Monthly	Preschool-Full Day-5 Days-Monthly	980.00	Michael Young	03/31/2019	06/21/2019	Active	Edit Delete Add % Discount

Child Recurring Billing added automatically

3. Discount - Add New Billing Item

After the automatic recurring program enrollment based billing, if there is a need to add recurring credit like **fixed amount** discount, you can do that with “Add New Billing”

Automatic Recurring Billing [Add New Billing](#)

With Program Based Billing, the tuition associated with the above program is automatically assigned.

Program Billing

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

Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date		Status	Action
						Start	End		
Sponsor	Tuition Charge	Monthly	Preschool-Full Day-5 Days-Monthly	980.00	Michael Young	03/31/2019	06/21/2019	Active	Edit Delete Add % Discount

Select [Add New Billing](#)

Add / Edit Tuition

Billing Type: Program Schedule Based
 Ledger Type: Sponsor
 Transaction Type: Credit
 Billing Cycle: Monthly
 Billing Description: Corporate Discount

Amount: \$50.00
 Comments: Michael Young
 Start Date: 03/31/2019
 End Date: 12/31/2019
 Status: Active

Save Cancel

For percentage discount, simply click on the "Add % Discount" link.

Automatic Recurring Billing

With Program Based Billing, the tuition associated with the above program is automatically assigned.

Billing Cycle: Monthly

Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date		Status	Action
						Start	End		
Sponsor	Tuition Charge	Monthly	Preschool-Full Day-5 Days-Monthly	980.00	Michael Young	03/31/2019	06/21/2019	Active	Edit Delete Add % Discount
Sponsor	Credit	Monthly	Corporate Discount	50.00	Michael Young	03/31/2019	12/31/2019	Active	Edit Delete

Enter the percentage and Save.

Add / Edit % Discount

Credit Description: Sibling Discount
 Credit %: 10.0
 Comments: Michael Young

Save Cancel

Automatic Recurring Billing

With Program Based Billing, the tuition associated with the above program is automatically assigned.

Billing Cycle: Monthly

Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date		Status	Action
						Start	End		
Sponsor	Tuition Charge	Monthly	Preschool-Full Day-5 Days-Monthly	980.00	Michael Young	03/31/2019	06/21/2019	Active	Edit Delete Add % Discount
			Sibling Discount	10.0%	Michael Young				Edit Delete

System will automatically calculate the discount each billing period.

4. Delete a Program

After a program is added, you have the option to delete the program.

Child Name: Michael Young

Child Program & Schedule

Add New Program

Program Name	Days Offered	Start Date	End Date	Action
Preschool-Full Day-5 Days	M,Tu,W,Th,F	03/31/2019	06/21/2019	Edit Delete

Day	Time In	TimeOut	Total Hrs	Classroom
Mon	08:00 am	06:00 pm	10.00	Dandelions
Tue	08:00 am	06:00 pm	10.00	Dandelions
Wed	08:00 am	06:00 pm	10.00	Dandelions
Thu	08:00 am	06:00 pm	10.00	Dandelions
Fri	08:00 am	06:00 pm	10.00	Dandelions
Grand Total			50.00	

Any changes you made to the programs for a child are captured in the Program History.

Child Name: Michael Young

Child Program & Schedule

Add New Program Program History

Parent Information

Program Name	Start Date	End Date	Days Offered	Status	Modified On
Preschool-Full Day-5 Days	03/31/2019	06/21/2019	M,Tu,W,Th,F	Deleted	03/31/2019 02:03 PM

Child: Michael Young 2.8 Years Active Select Program & Billing Immunization Time Card

5. How to handle Program Billing for a Subsidized Child

You need to add a program to a subsidized child like a regular child as described above.

The system defaults the Sponsor ledger for the entire billing amount associated with the selected program. Once the program has been added, you can edit the ledger and the billing amount accordingly.

Child Program & Schedule Add New Program

Child Program

Program Name	Days Offered	Start Date	End Date	Action
Toddler-Full Day-5 Days	M,Tu,W,Th,F	08/29/2018	06/21/2019	Edit

Child Schedule

Day	Time In	Time Out	Total Hrs	Classroom
Mon	06:00 am	06:00 pm	12.00	Not Assigned
Tue	06:00 am	06:00 pm	12.00	Not Assigned
Wed	06:00 am	06:00 pm	12.00	Not Assigned
Thu	06:00 am	06:00 pm	12.00	Not Assigned
Fri	06:00 am	06:00 pm	12.00	Not Assigned

System defaults the Sponsor ledger. For subsidized child, you can "Edit" the ledger to the 3rd Party Agency and the amount

Automatic Recurring Billing Add New Billing

With Program Based Billing, the tuition associated with the above program is automatically assigned.

Program Billing Change Billing Cycle

Billing Cycle: Monthly

Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date		Status	Action
						Start	End		
Sponsor	Tuition Charge	Monthly	Toddler-Full Day-5 Days-Monthly	1,200.00	Jorge Doss	08/29/2018	06/21/2019	Active	Edit Delete Add % Discount

Select

Change the ledger to Agency and amount

Add / Edit Tuition

Program Name: Toddler-Full Day-5 Days

Child Schedule:

Day	Time
Mon	06:00
Tue	06:00
Wed	06:00
Thu	06:00
Fri	06:00

Automatic Recurring Billing Add New Billing

With Program Based Billing, the tuition associated with the above program is automatically assigned.

Program Billing Change Billing Cycle

Billing Cycle: Monthly

Ledger Type CCA

Transaction Type Tuition Charge

Billing Cycle Monthly

Billing Description Toddler-Full Day-5 Days-Monthly

Fee Type Schedule Based

Calculation Unit Flat Rate

Amount \$1,000.00

Comments Jorge Doss

Start Date 08/29/2018

End Date 06/21/2019

Status Active

[Save](#) [Cancel](#)

After that, you can add a new billing item for the Sponsor ledger to setup the parent co-pay.

Add / Edit Tuition

Billing Type: Program Schedule Based

Ledger Type: Sponsor

Transaction Type: Tuition Charge

Billing Cycle: Monthly

Billing Description: Parent Co-Pay

Fee Type: Schedule Based

Calculation Unit: Flat Rate

Amount: \$200.00

Comments: Jorge Doss

Start Date: MM/DD/YYYY

End Date: MM/DD/YYYY

Status: Active

Buttons: Save, Cancel

Following is an example of what a subsidized child recurring billing looks like after the adjustment from automatic program enrollment billing.

Automatic Recurring Billing

With Program Based Billing, the tuition associated with the above program is automatically assigned.

Program Billing

Billing Cycle: Monthly

Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date		Status	Action
						Start	End		
CCA	Tuition Charge	Monthly	Toddler-Full Day-5 Days-Monthly	1,000.00	Jorge Doss	08/29/2018	06/21/2019	Active	Edit Delete Add % Discount
Sponsor	Tuition Charge	Monthly	Parent Co-Pay	200.00	Jorge Doss			Active	Edit Delete Add % Discount