

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

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



This user guide covers <u>method one</u> 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:

							Select	
	Child Sele	ction:			/		Add New Child	
	Selected	Name	Age	Status	Action			
	4	Michael Young	2.8 Years	Active	Select Program & Billing	Immunization	Time Card	
Child Name Michael Young				iave		S	elect	$\overline{}$
Child Program & S	bedule							Add New Pr

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

Child's Date of Birth	07/25/2016	 Enter the Enrollment Date
Enrollment Start Date	MM/DD/YYYY	
	Next	

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.

	Child's Date of Birth	07/25/2016					
E	nrollment Start Date	03/31/2019					
Age at th	e time of Enrollment	2.8 Years (Preschool 2	Years - 3 Years)				
	Select Age Group	O Infant O Toddler O Pre-K O School	Preschool Age ACA 4s	Select the right program			
			¥				
	Select a Program		*	-			
Program Name	Select a Program Program	m Type	Days Offered	• Time			
Program Name Preschool-Full Day-2 Days	Select a Program Program Full Tim	m Type ne	Days Offered 2 days	Time 08:00 AM - 06:00 PM			
Program Name Preschool-Full Day-2 Days Preschool-Full Day-3 Days	Select a Program Program Full Tim Full Tim	m Type ne ne	Days Offered 2 days 3 days	Time 08:00 AM - 06:00 PM 08:00 AM - 06:00 PM			
Program Name Preschool-Full Day-2 Days Preschool-Full Day-3 Days Preschool-Full Day-5 Days	Select a Program Program Full Tim Full Tim Full Tim	m Type ne ne	Days Offered 2 days 3 days M,Tu,W,Th,F	Time 08:00 AM - 06:00 PM 08:00 AM - 06:00 PM 08:00 AM - 06:00 PM			
Program Name Preschool-Full Day-2 Days Preschool-Full Day-3 Days Preschool-Full Day-5 Days Preschool-Full Day-M,W,F	Select a Program Program Full Tim Full Tim Full Tim Full Tim Full Tim	m Type ne ne ne	Days Offered 2 days 3 days M,Tu,W,Th,F M,W,F	Time 08:00 AM - 06:00 PM 08:00 AM - 06:00 PM 08:00 AM - 06:00 PM 08:00 AM - 06:00 PM			

Add/Edit Program	×
Child's Date of Birth Enrollment Start Date Age at the time of Enrollment Select Age Group Select a Program Days Offered Time	07/25/2016 03/31/2019 2.8 Years (Preschool 2 Years - 3 Years) Infant Toddler Preschool Pre-K School Age ACA 4s Preschool-Full Day-5 Days Mon Tue Wed Thu F 08:00 AM - 06:00 PM
Billing Cycle Fee	Monthly \$980.00 Next Cancel



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

	Child Prog	ram					Add	New Program	_
	Program I	lame		Days Offered	Start Date	End Date	Action	ir	
	Preschool	-Full Day-5 Days		M,Tu,W,Th,F	03/31/2019	06/21/201	19 Edit	Delete	
	Day	Time In	TimeOut		Total Hrs	c	assroom	Child	Schedule add
	Mon	08:00 am	06:00 pm			10.00 De	andelions		
	Tue	08:00 am	06:00 pm		/	10.00 Da	andelions	auton	natically
	Wed	08:00 am	06:00 pm			10.00 Da	andelions		_
	Thu	08:00 am	06:00 pm			10.00 Da	andelions		
	Fri	08:00 am	06:00 pm			10.00 Da	andelions		
	j			Grand Total		50.00			
Automatic Re	curring Billing								Add New
	contrary bring								
With Program Base	d Billing, the tuition as	sociated with the above pro	gram is automatica	lly assigned.		Child	Recur	ring Billi	ng
				- 19					<u></u>
PROFESSION PROVIDENCE									

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"

Automa	tic Recurring							Add New	
With Progr	am Based Billing, th Billing	Se	lect						
Billing Cy	cle: Monthly								Change Billing Cycle
Billing Cy	cle: Monthly Transaction	Billing	Billing / Credit	Amount /		Da	ite		Change Billing Cycle
Billing Cyr Ledger Type	cle: Monthly Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Start	ite End	Status	Change Billing Cycle

				Billing Type	Program Schedule Based		1	TE Value : 1	
Automa		Billing		Ledger Type	Sponsor	•			Add New Bill
With Proof	aro Based Billing, 17	he tuition associa	abed wi	Transaction Type	Credit				
	Durit and a second part of			Billing Cycle	Monthly	•			
Billing Cve	det Monthly			Billing Description	Corporate Discount	•			
Ledger			810	Amount	\$50.00				PRODUCTION OF THE
			Des	Comments	Michael Young		Status		
Sponsor	Tuition Charge	Monthly	Pres	Start Date	03/31/2019	•	Active	Edit Delete Add %	Dischunt
				End Date	12/31/2019	•			
Attendar				Status	Active	*			
Billing Cyr	te: Weekly			Save	Cancel				

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

Automa	tic Recurring	Billing						0.97	Add New
With Program Based Billing, the tuition associated with the above program is automatically assigned. Program Billing									\mathbf{X}
Billing Cy	cle: Monthly								Change Billing Cycle
Ledger	Transaction	Billing	Billing / Credit	Amount /	Common to	Da	te	Charles	
Туре	Туре	Frequency	Description	Credit %	Comments	Start	End	Status	Action
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.

Program	Billing			Credit Description	Sibling Discount			
Billing Cy	cle: Monthly			Credit %	10.0	1		
Ledger Type	Transaction Type	Billing Frequency	Billi Des	Comments	Michael Young		Status	
Constant	Tuition Charge	Monthly	Pres	Save	Cancel		bacautt?	
utoma	tic Recurring	Billing	Davy			/	Syst	tem will automatical culate the discount
Automal Vith Program	tic Recurring m Based Billing, the Billing	Billing tuition associat	ted with the above progra	im is automatically assign	ed.	/	 Syst calc eac	tem will automatical sulate the discount h billing period.
Automal Vith Progra Program	tic Recurring m Based Billing, the Billing le: Monthly	Billing tuition associat	ted with the above progra	sm is automatically assign	ied.	/	 Syst calc eac	tem will automatical culate the discount h billing period.

4. Delete a Program

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

Child Program & Sc	hedule		Delete a	a program					
	Child Prog	ram					\backslash	Add	I New Progr
	Program	Name		Days Offered	Start Date	End	Date	Action	
	Preschool	-Full Day-5 Days		M,Tu,W,Th,F	03/31/2019	03/31/2019 06/21/			Delete
	Day	Time In	TimeOut		Total Hrs		Classro	om	
	Mon	08:00 am	06:00 pm			10.00	Dandeli	ons	
	Tue	08:00 am	06:00 pm)((10.00	Dandeli	ons	
	Wed	08:00 am	06:00 pm			10.00	Dandeli	ons	
	Thu	08:00 am	06:00 pm			10.00	Dandeli	ons	
	Fri	08:00 am	06:00 pm			10.00	Dandeli	ons	
	10.00			a second s		-			

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

		Click on "F program c	Program change h	History"	to see a chilo		
Child Name Michael Young							
Child Program & Schedule	e						Add New Program Program History
Parent Informati	rogram History					×	1
	Program Name	Start Date	End Date	Days Offered	Status	Modified On	
Child	Preschool-Full Day-5 Days	03/31/2019	06/21/2019	M,Tu,W,Th,F	Deleted	03/31/2019 02:03 PM	Child
Sele							
7	Michael Young	2.1	8 Years A	ctive Sciett Pro	gram & PUllin	0 Immunication Time Car	a

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 Nan	16		Days Offered	Start	Date End	Date Ac	tion
	Toddler-Full Da	ay-5 Days		M,Tu,W,Th,F	08/29	9/2018 06/2	1/2019 Ed	t
	Child Schedul							
	Day	Time In	TimeOut	Tota	l Hrs	Classroom		
	Mon	06:00 am	06:00 pm		12.00	Not Assigned	d	
	Tue	06:00 am	06:00 pm		12.00	Not Assigned	d	
	Wed	06:00 am	06:00 pm		12.00	Not Assigned	d	
	Thu	O6:0 System d	lefaults the	Sponsor	edger For	subsidi	zed chil	d you
Automatic Recur	ring Billing	can "Edit	" the ledge	er to the 3'	rd Party Age	ency and	d the ar	nount Add New Bill
With Program Based Billi Program Billing	ng, the tuition assoc	ated with the above progra	m is automatically a	ssigned.	Solo	-+		
Billing Cycle: Monthly					Jelet			Change Billing Cycle
Ledger Transactio Type Type	n Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date Start E	ind s	itatus Activ	n
Sponsor Ultion Cha	ge Monthly	Toddler-Full Day-5 Days Monthly	- 1,200.00	lorge Doss	08/29/2018 0	6/21/2019 A	ctive Edit	Delete Add % Discount

					Change the ledger to	Agency and amount
	Program Name			Dave Offered		- <i>i</i>
	Toddler-Full Day	S Di Add / Edit Tuition		L		
			Ledger Type	CCA	- /	
		Tra	insaction Type	Tuition Charge	- /	
	Day	Time	Billing Cycle	Monthly	- /	
	Mon	06:00 Billi	ng Description	Toddler-Full Day-5 Days-Mon	thly +	
	Tue	06:00	Fee Type	Schedule Based	aned	
	Wied -	06:01 C	alculation Unit	Flat Rate	ined	
	Thu	06:0	Amount	\$1,000.00	aned	
	Fri:	06:01	Commonte	Jorga Dorg	aned .	
			comments	Jorge Doss		
Automatic Recurrin			Start Date	08/29/2018		
			End Date	06/21/2019	•	The state sound
With Program Based Billing,	the tuition associa	ted wi	Status	Active	-	
Program Billing			Save	Cancel		
Billing Cycle: Monthly			-			Change Billing Cycle

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

			Add / Ed	lit Tuition			×	
With Pr	ogram Based Billing, ti	ie tultion associ	ated wi	Billing Type	Program Schedule Bas	ed 🔹		
Progr	am Billing			Ledger Type	Sponsor			
Billing	Cycle: Monthly			Transaction Type	Tuition Charge	•		
Ledge			8/11/	Billing Cycle	Monthly		Status	
Туре	Туре	Frequency	Des	Billing Description	Parent Co-Pay	•	and the second second	Contract of Contra
CCA	Tuition Charge	Monthly	Tode Mont	Fee Type	Schedule Based		Active	Edit Delete Add.56 Discount
				Calculation Unit	Flat Rate			
				Amount	\$200.00			
				Comments	Jorge Doss			
Subs	dized Billing int	formation		Start Date	MM/DD/YYYY	•		
	Euli Da	v Pally Pate 6		End Date	MM/DD/YYYY	•	in and	
	Pun Da	A manua ware S		Status	Active	*	niges.	
	Part Da	y Daily Rate \$					Ingled	
		Comments		Save	Cancel			

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

Automa	tic Recurring	Billing							Add New
With Progr	am Based Billing, th	ne tuition associa	sted with the above program	is automatically	assigned.				
Program	Billing								
Billing Cu	der Monthly								
bining cyc	cies Pionony								Change Billing Cycle
Ledger	Transaction	Billing	Billing / Credit	Amount /		De	te		Change Billing Cycle
Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Da	te End	Status	Change Billing Cycle
Ledger Type CCA	Transaction Type Tuition Charge	Billing Frequency Monthly	Billing / Credit Description Toddler-Full Day-5 Days- Monthly	Amount / Credit %	Comments Jorge Doss	Da Start 08/29/2018	te End 06/21/2019	Status Active	Action Edit Delete Add % Discount