



## Creating NEW Rate Schedules with Bulk Service Upgrades

(Discharging Active Children and applying a Rate Change for all Active Children)

### Getting Started:

- Login to ChildWare
- Click on Admin
- Scroll down and select Agency/Site
- Click on **Select** under Sites (if agency has multiple sites – this process will have to be repeated for each site requested)

ChildWare Home | Change User | Change Site | Help | Log Out

PHLpreK

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Agency: PHLpreK OK Cancel

Main ChildWare PLUS Setup

Agency Demographics

Name: PHLpreK  
 Address 1: 1500 Market Street  
 Address 2:  
 City: Philadelphia  
 State: PA Zip: 19102  
 Phone: -  
 Fax: -  
 Email: PHLpreK@phmc.org  
 MPI ID:  
 Note:  
 Active? ☒  
 Test Agency? ☐  
 ChildWare Version: ChildWare Plus  
 Default Site:

Sites Add Site

	ID	Name	Phone	Active	
Select	PHLPREK	PHLpreK		Yes	Delete

- Click on the **Care Tab**, and then click on **Select** under **Care Levels**.

ChildWare Home | Change User | Change Site | Help | Log Out

PHLpreK

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Site: PHLpreK OK Cancel

Main Events Rooms **Care** Meals Transportation Other Charges Subsidies Discounts Other Settings Log

Accreditations

[Please review all tabs before creating/updating care rate tables](#)

Care Levels Care Types Sliding Scales Care Rates Service Agreement

**Care Levels** Add Care Level

View or Search By: Active Care Levels ▾

Select	Description	Sort	Active	Entered	By	
<input type="checkbox"/>	Preschool	4	Yes	12/01/2016	RGAMBINO	Delete

- Updating rates will need to be completed for each “**Period**” in the Care Rate Tables, so as not to disrupt the present billing cycle.
- To update rates, click on **Add Care Rate Table**

ChildWare Home | Change User | Change Site | Help | Log Out

Happy Children Early Childcare Center

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Site: Adrienne's Learning Center OK Cancel

Main Events Rooms Care **Meals** Transportation Other Charges Subsidies Discounts Other Settings Log

Accreditations

[Please review all tabs before creating/updating care rate tables](#)

Care Levels Care Types Sliding Scales **Care Rates** Service Agreement

[Days Site Open](#)

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

☒ ☒ ☒ ☒ ☒ ☐ ☐

**Care Rate Tables** Add Care Rate Table

View or Search By: Active Care Rate Tables ▾

Select	Period	Days	Sliding Scale	Effective	Expiration	Comment	Entered	By	
<input type="checkbox"/>	Weekly	2		01/01/2011			10/05/2011	CBALSAMO	Delete
<input type="checkbox"/>	Weekly	3		01/01/2011			10/05/2011	CBALSAMO	Delete
<input type="checkbox"/>	Weekly	4		01/01/2011			10/18/2011	CBALSAMO	Delete
<input type="checkbox"/>	Weekly	5		01/01/2011			10/05/2011	CBALSAMO	Delete

- After you click on “**Add Care Rate Table**”, fill in the following information for each period

ChildWare

Child/Family ▾ Staff ▾ Attendance/Meals ▾

**Care Rate Table: Adrienne's Learning Center**

**Rate Table**

Rate Period:  ▾

Days Per Week:  1 to  5

Effective Date:

effected.

ChildWare Home | Change User | Change Site | Help | Log Out

Little Learners Academy

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Care Rate Table: Magic Minds Child Care OK Cancel

Rate Table

Rate Period: ▾

Days Per Week: ▾

Sliding Scale: ▾ (no sliding scale specification will create rate tables for all sliding scales)

Effective Date: ▾

Quarterly

- Choose **Rate Period**.

- Choose **Effective Date**

ChildWare

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾

Care Rate Table: Magic Minds Child Care

Rate Table

Rate Period: ▾

Days Per Week: 1 to 5

Sliding Scale: ▾ (no sliding scale specification will create rate table)

Effective Date: ▾

April, 2019

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today: April 23, 2019

- Click **OK**. A dialogue box will open, click on **Yes**.

ChildWare Validation

There is already an active rate table for this period and number of days.

Would you like to end this existing rate table based on the new rate table begin date?

Yes No

- Notice that there is now an **effective date and an expiration date posted on the Active Care Levels**. The expiration date will automatically populate as (1) day prior to the effective date of your new care rate table.

[Main](#) [Events](#) [Rooms](#) [Care](#) [Meals](#) [Transportation](#) [Other Charges](#) [Subsidies](#) [Discounts](#) [Other](#) [Settings](#) [Log](#)

Accreditations

[Please review all tabs before creating/updating care rate tables](#)

[Care Levels](#) [Care Types](#) [Sliding Scales](#) [Care Rates](#) [Service Agreement](#)

[Days Site Open](#)

Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☐ Sunday ☐

[Care Rate Tables](#) [Add Care Rate Table](#)

View or Search By: Active Care Rate Tables

	Period	Days	Sliding Scale	Effective	Expiration	Comment	Entered	By	
<a href="#">Select</a>	Weekly	2		01/01/2011	08/30/2017		10/05/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	3		01/01/2011	08/30/2017		10/05/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	4		01/01/2011	08/30/2017		10/18/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	5		01/01/2011	08/30/2017		10/05/2011	CBALSAMO	<a href="#">Delete</a>

- To view all care tables present and future click on the down arrow at **View or Search by** and choose **All Care Tables**.

Site: **Adrienne's Learning Center**

[OK](#)

[Cancel](#)

[Main](#) [Events](#) [Rooms](#) [Care](#) [Meals](#) [Transportation](#) [Other Charges](#) [Subsidies](#) [Discounts](#) [Other](#) [Settings](#) [Log](#)

Accreditations

[Please review all tabs before creating/updating care rate tables](#)

[Care Levels](#) [Care Types](#) [Sliding Scales](#) [Care Rates](#) [Service Agreement](#)

[Days Site Open](#)

Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☐ Sunday ☐

[Care Rate Tables](#) [Add Care Rate Table](#)

View or Search By: All Care Rate Tables

Active Care Rate Tables  
 All Care Rate Tables

	Period	Days	Sliding Scale	Effective	Expiration	Comment	Entered	By	
<a href="#">Select</a>	Weekly	1		08/31/2017			08/29/2017	GFARALLYSEMERAD	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	2		01/01/2011	08/30/2017		10/05/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	2		08/31/2017			08/29/2017	GFARALLYSEMERAD	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	3		01/01/2011	08/30/2017		10/05/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	3		08/31/2017			08/29/2017	GFARALLYSEMERAD	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	4		01/01/2011	08/30/2017		10/18/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	4		08/31/2017			08/29/2017	GFARALLYSEMERAD	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	5		01/01/2011	08/30/2017		10/05/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Weekly	5		08/31/2017			08/29/2017	GFARALLYSEMERAD	<a href="#">Delete</a>

- Now click on each **NEW care table** and **set the rate for each weekly rate (Period- 2day/3day/4day/5day)**. You do not need to set an expiration date.

**Care Rate Table: Adrienne's Learning Center**

OK

Cancel

**Rate Table: Weekly / 2 Days**

Effective Date: 08/31/2017

Expiration Date:

Note:

**Rate Grid**

Care Level	Full Day	Half Day	After School	School Day
Infant				
Young Toddler				
Older Toddler				
Preschool				
School Age				

Click **OK** to save changes after completing your entries. Repeat this process until all weekly rates are updated.

Once *all rates have been updated*, you will need to perform a **Bulk Service Update**.

## BULK SERVICE UPDATES

ChildWare's Bulk Service Updates, which is found under Child/Family heading, allows you to edit various fields for multiple children. Your options include Re-enrolling Discharged Students, Discharge Active Students, and Modify Service Profiles for Active Children, Rate Change for Active Children and Subsidy Rate Change for Every Active Child.

**Re-enrolling Discharged Children:** EX: If a provider discharges all their children for the summer, but want to have them all enrolled for September, you can use the re-enroll discharge students' option. This saves the organization from having to re-enroll each child individually. It is important to get a list of students that will not be returning, to make sure that you do not enroll that student.

**Discharge Active Students:** EX: It is the end of the term and the provider needs to discharge multiple children – by using this function, you can discharge all active students at once, saving the provider from having to discharge students individually.

**Modify Service Profiles for Active Students:** EX: Parameters associated with certain care levels have changed, perhaps the hours of after or before care. You can change this service profile via bulk changes, saving the provider from having to do this task individually.

**Rate Change for Active Children:** EX: there is a rate increase for multiple care levels, and you need this to be reflected in the billing for the children. Peak time for rate change request occurs at the beginning and end of care terms.

**Subsidy Rate Change for Active Children:** EX: If Subsidies such as CCIS, Head Start, Philly K Counts, and PHLpreK have reimbursement changes, the providers need to update their subsidy rate tables. Peak time for rate change request occurs at the beginning and end of care terms.

ChildWare  
Happy Children Early Childcare Center

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Child Data  
Contact Data  
**Bulk Service Updates**  
Batch Record Updates  
Notification Emails  
PIN Maintenance

Add Child Advanced Search Print/Export List

	Name	DOB	Sex	Enrolled	Discharged	Entered	By		
Select		01/21/2014	F	09/01/2016	09/01/2017	04/01/2015	AHANNAN	Delete	
Select		01/03/2013	M	04/03/2017	08/31/2017	04/07/2017	AMCMAHON	Delete	
Select	Baygett	04/02/2011	M	09/01/2016		04/08/2015	AHANNAN	Delete	
Select	Battis	Daveon	11/27/2013	M	09/01/2016		04/01/2015	AHANNAN	Delete
Select	Beaverhousin	Anastasia	01/10/2013	F	09/09/2016		09/30/2016	TTRAINING	Delete

When you select **Bulk Service Updates**, a new screen appears.

ChildWare  
Little Learners Academy

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

**Bulk Service Updates** Process Updates

Process Update History

Update Action  
Action: ▾

Child Selection  
Select: ☒ Single Child ☐ Family ☐ Multiple Children

Click on the **Action** downward arrow and **choose the type** of Bulk Service Update options.

ChildWare  
Happy Children

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾

**Bulk Service Updates**

Process Update History

Update Action  
Action: ▾

Child Selection  
Select: ☐ Single Child ☐ Family ☐ Multiple Children

- Re-Enroll Discharged Children
- Discharge Active Children
- Modify Service Profiles For Active Children
- Rate Change For Active Children
- Subsidy Rate Change For Active Children**

## RE-ENROLL DISCHARGED CHILDREN/DISCHARGE ACTIVE STUDENTS

To Re-Enroll Discharged Children, scroll to Re-enroll Discharged Children.  
Fill in future enrollment date, and choose Multiple Children.

The screenshot shows the 'Bulk Service Updates' section of the ChildWare interface. At the top, there are navigation tabs: 'Child/Family', 'Staff', 'Attendance/Meals', and 'Billing'. Below these, the 'Bulk Service Updates' header is followed by 'Process Update' and 'History' tabs. The 'Update Action' section has a dropdown menu set to 'Re-Enroll Discharged Children'. The 'Re-Enrollment Information' section includes an 'Enrollment Date' field and a 'Note' text area. The 'Child Selection' section has radio buttons for 'Single Child', 'Family', and 'Multiple Children', with 'Multiple Children' being selected and highlighted by an orange box. Below the radio buttons is a 'Child:' dropdown menu.

Note: you can enter “Born Between” dates. This can be used rule out children who have turned 5 years old and gone on to Kindergarten. When you click on **Apply Filter** a list of student will appear. **The students with a checkmark next to their name will be included in the bulk update.** You have the option to uncheck or check any child on the list.

This screenshot shows the same 'Bulk Service Updates' form, but with more details filled in. The 'Enrollment Date' is now '08/31/2017'. In the 'Child Selection' section, the 'Born Between' filter is highlighted with an orange box, showing two empty date fields separated by 'and'. To the right of this, there are three dropdown menus: 'Include Care Type' (set to 'All Care Types'), 'Include Care Level' (set to 'All Care Levels'), and 'Include Subsidy' (set to 'All Subsidies'). At the bottom right, there are three buttons: 'Apply Filter', 'Reset Filter', and 'Print Proposed'.

**Apply Filter**

**Bulk Service Updates** Process Updates

Process Update | History

**Update Action**  
Action: Re-Enroll Discharged Children

**Re-Enrollment Information**  
Enrollment Date:   
Note:

**Child Selection**  
Select: ☐ Single Child ☐ Family ☒ Multiple Children

Born Between:  and   
 Include Room Group:  All Room Groups   
 Include Room:  All Rooms

Include Care Type:  All Care Types   
 Include Care Level:  All Care Levels   
 Include Subsidy:  All Subsidies

Birth Date Between 09/01/2012 and 08/31/2014 OR Birth Date Between 09/01/2009 and 08/31/2011

Apply Filter | Reset Filter | Print Proposed

Include	Child's Name	DOB	Room	Enrolled	Discharged
<input checked="" type="checkbox"/>	Alexander, Dustin	12/21/2009	Big Learners - K-2nd Grade Room	3/13/2011	1/15/2012
<input type="checkbox"/>	Allen, Anna	04/23/2006	Little Learners - Preschool Room	4/1/2011	6/16/2017
<input type="checkbox"/>	Balances, Bernard	06/22/2012	Little Learners - Preschool Room	2/1/2016	6/12/2017
<input type="checkbox"/>	Balances, Bradley	01/01/2012	Little Learners - Preschool Room	1/1/2015	6/16/2017
<input checked="" type="checkbox"/>	Balsamo, Patrick	11/02/2009	Little Learners - Preschool Room	3/4/2014	5/18/2017
<input type="checkbox"/>	Balsamo, Rocco	11/25/2004	Little Learners - Preschool Room	10/15/2011	5/18/2017
<input checked="" type="checkbox"/>	Banks, Christina	12/24/2009	Little Learners - Preschool Room	11/15/2011	6/16/2017

Next: Click on **Print Proposed** and look at the total numbers.

ABC Day Care  
Little Learners Academy  
**Bulk Update List**  
Birth Date Between 09/01/2012 and 08/31/2014 OR Birth Date Between 09/01/2009 and 08/31/2011  
Report Date: 8/30/2017

**Re-Enroll Discharged Children - Temp**

Child's Name	Birth Date	Sex	Enrollment	Discharge	Care Level	Status
Alexander, Dustin	12/21/2009	M	3/13/2011	1/15/2012	Young Toddler	Not Processed
Balsamo, Patrick	11/2/2009	M	3/4/2014	5/18/2017	Preschool	Not Processed
Banks, Christina	12/24/2009	F	11/15/2011	6/16/2017	Preschool	Not Processed
Smith, Bradley	9/22/2009	M	4/15/2011	6/30/2014	Older Toddler	Not Processed

**Count: 4**

This number should match the number when you click on **Process Updates**.

**Bulk Service Updates** Process Updates

Process Update | History

**Update Action**  
Action: Re-Enroll Discharged Children

**Re-Enrollment Information**  
Enrollment Date:   
Note:

**Child Selection**  
Select: ☐ Single Child ☐ Family ☒ Multiple Children

Born Between:  and   
 Include Room Group:  All Room Groups   
 Include Room:  All Rooms

Include Care Type:  All Care Types   
 Include Care Level:  All Care Levels   
 Include Subsidy:  All Subsidies

Birth Date Between 09/01/2012 and 08/31/2014 OR Birth Date Between 09/01/2009 and 08/31/2011

Apply Filter | Reset Filter | Print Proposed

Include	Child's Name	DOB	Room	Enrolled	Discharged
<input checked="" type="checkbox"/>	Alexander, Dustin	12/21/2009	Big Learners - K-2nd Grade Room	3/13/2011	1/15/2012
<input type="checkbox"/>	Allen, Anna	04/23/2006	Little Learners - Preschool Room	4/1/2011	6/16/2017
<input type="checkbox"/>	Balances, Bernard	06/22/2012	Little Learners - Preschool Room	2/1/2016	6/12/2017
<input type="checkbox"/>	Balances, Bradley	01/01/2012	Little Learners - Preschool Room	1/1/2015	6/16/2017
<input checked="" type="checkbox"/>	Balsamo, Patrick	11/02/2009	Little Learners - Preschool Room	3/4/2014	5/18/2017
<input type="checkbox"/>	Balsamo, Rocco	11/25/2004	Little Learners - Preschool Room	10/15/2011	5/18/2017
<input checked="" type="checkbox"/>	Banks, Christina	12/24/2009	Little Learners - Preschool Room	11/15/2011	6/16/2017

To verify the process, go to Child/Family and click on Child Data, View and Search by Future Enrollment. You should see the students in the Future Enrollment list that are returning.

If you choose **DISCHARGING ACTIVE STUDENTS** from the Bulk Service Updates action list the process is very similar. **Instead of putting in an Enroll date, you put in a Discharge date.** The rest of the steps are the same as above.

## **RATE CHANGE FOR ACTIVE CHILDREN**

Once you have updated all the care level rates for the agency you need to perform a bulk service upgrade. To change the rates for **ALL ACTIVE CHILDREN**:

1. Login to **ChildWare**
2. Click on **Admin**
3. Scroll to **Agency/Site**
4. Select **Site**
5. Click on **Child/Family**
6. Scroll down to **Rate Change for Active Children**
7. Fill in **Effective date** for rate changes and click on **Process Updates**.