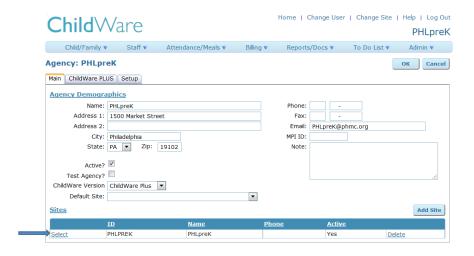


# **Creating NEW Rate Schedules with Bulk Service Upgrades**

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

#### **Getting Started:**

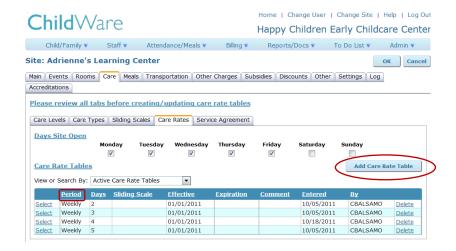
- Login to ChildWare
- Click on Admin
- Scroll down and select Agency/Site
- Click on **Select** under Sites (if agency has multiple sites this process will have to be repeated for each site requested)



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



- 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



• After you click on "Add Care Rate Table", fill in the following information for each period



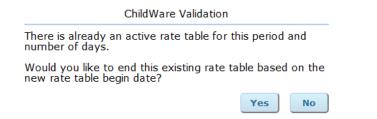


Choose Rate Period.

• Choose Effective Date



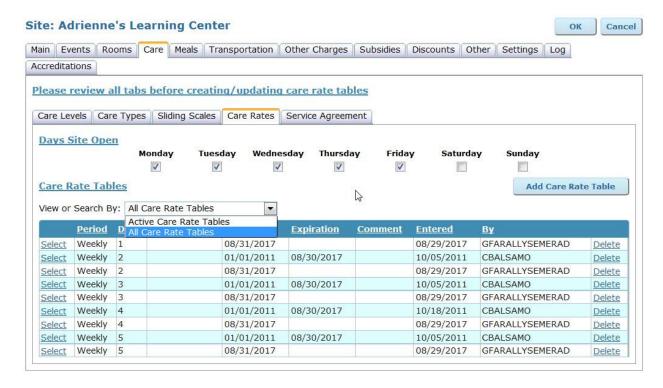
Click OK. A dialogue box will open, click on Yes.



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.



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



 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 Tab  Rate Table: Wee  Effective Date:	kly / 2 Days	e's Learning Ce	enter		OK Can
Expiration Date: Note:			al		
Rate Grid Care Level		Full Day	Half Day	After School	School Day
Infant		All title			
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.

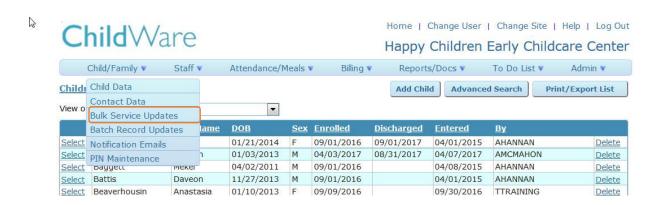
**Re-enrolling Discharged Children:** EX: If a provider discharges all their children for the summer, but want to have them all enrolled for September, you can use the re-enroll discharge students' option. This saves the organization from having to re-enroll each child individually. It is important to 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.



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



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



### RE-ENROLL DISCHARGED CHILDREN/DISCHARGE ACTIVE STUDENTS

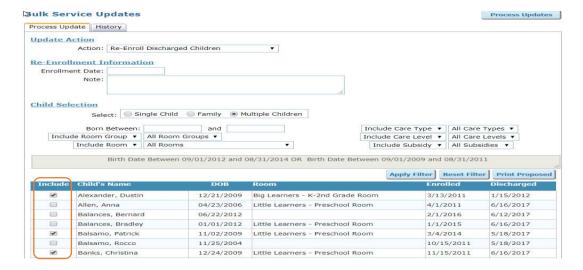
To Re-Enroll Discharged Children, scroll to Re-enroll Discharged Children. Fill in future enrollment date, and choose Multiple Children.



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.



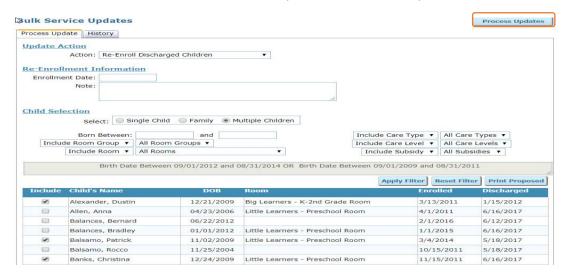
**Apply Filter** 



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



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



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.