Family Record, Third Party Tab

Last Modified on 03/14/2019 12:42 pm EDT

The Third Party tab displays split family detail, including the split between parents and any third party contracts associated with the family.

Before detail can be added to either divorced parents or sponsored families, the family must be split. To split the family, select the primary payer's radio button and then select save. Once a family is split they can never have just one ledger on the same account.



If the parent will be paying a portion of the child's fees the Sponsor field radio button should be set to yes for each. The percentage paid should be the portion of 100% the parent would be responsible for. If the family also is sponsored by a third party the percentage paid is in relation to the amount of the copay each parent is responsible for.

<	Family	ID 317251 al Note:				Stu	udent(s)	S	tatement Ty	/pe		Balan Add/View	ce Outstandin	g .	>
nary Fa	amily C	hildren Parent	ts Third Party	Volunteers	Comm	unication	n Au	to-Pay Va	acation	Financials	Receipts	6 Merge				
Parer	nt/Gua	rdian Spons	or Informatic	on												
Parent/	Guardian	:		Sp	onsor:						Percen	tage Paid				
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irst Nam inkerbel	e l	Last Name Peter Pan														
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Third Pa	rty Contr	act List (Peter Pa	an, Tinkerbell) 🛛 📔	+												
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ample A	gency		01/01/2017	12/31/20	99 🥻	3	×	12/0	5/2017	dcw_kga	SS	12/14/2	2017 da	cw_kgass		

Once the family has been split, third party contracts can be added onto the child's record. To add a contract, select the blue square icon with the pencil.

Wendy Peter Pan Ves No % 50.0 Parent/Guardian: Sponsor: Percentage Paid Peter Peter Pan Yes No % 50.0	50.0 Paid	% 50.0					
Parent/Guardian: Sponsor: Percentage Paid Peter Peter Pan No Percentage Paid % 50.0 Family List First Name Last Name	Paid		10	Yes O No	\bigcirc	eter Pan	Wendy F
Peter Peter Pan O Yes No % 50.0	Talu	Percentage Paid		ISOT:	Spor	dian:	Parent/Gua
Family List First Name Last Name	50.0	% 50.0	10	Yes O No	\bigcirc	er Pan	Peter Pe
First Name Last Name							Family List
						 Last Name	First Name
Tinkerbell Peter Pan						Peter Pan	Tinkerbell

To add a contract select the + button above the agency list-

Family List							
First Name	Last Name						
Tinkerbell	Peter Pan						
4							
•							
Third Party Con	tract List (Peter Par	n, Tinkerbell)	+				
Agency		From	O			Created	Cre
Sample Agency		01/01/2017	12/31/2099	C ×	ß	12/05/2017	dcv

Select the agency from the agency drop down list, add contract detail (the fields displayed on this screen will change based off of the third party's settings). Once detail has been entered press Save.

Parent/ Parent/Gu Wendy	Guardian :	-		volunteers	Commu	inication	Auto-Pa	Vacation	Financials	Receipts	Merge		
Parent/Gu Nendy		Sponsor	Informati	on									
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	Peter Pan				Yes					%	50.0		
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Agency	Contract	- Peter F	Pan, Tinke	rbell									
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<u>m</u>	tart Date.								Date.				
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Child Con	tract ID#:			Ca	ise #:					Case Wo	rker:		
4										2			

The child's program/room assignments will display in the Assignment Lists box, select the option to Add to Contract if the contract detail should apply to the program/room assignment- then press Save Contract.

When billing is created the detail on the third party tab will ensure the parents are charged their copay (and over market if applicable) and the third party is charged for the portion of tuition they are covering.