

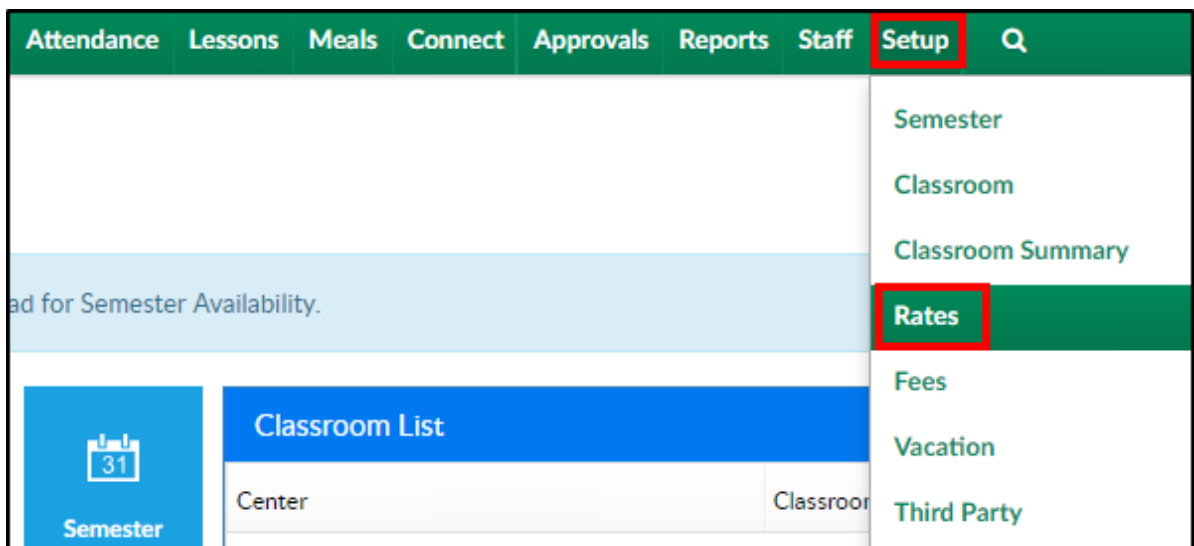
Setup Rate Category

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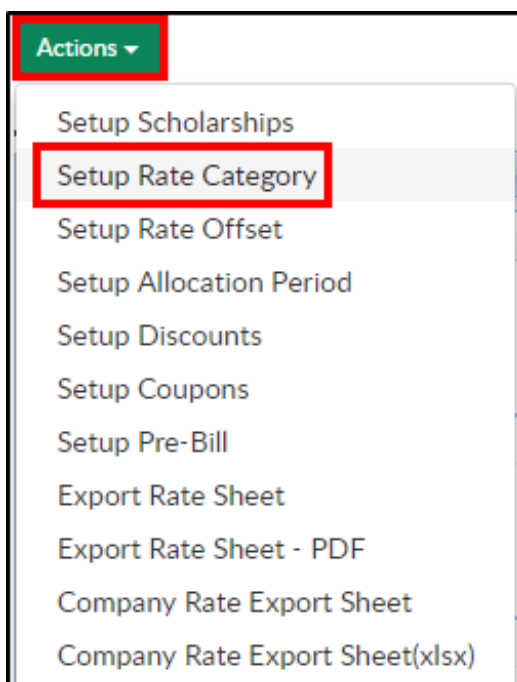
How to Setup Rate Categories: Rate categories in the system allow rates to be automatically associated to children based on the child's age, center level or family's income.

This method is optional; however we recommend setting up rate categories. Rate categories should be setup prior to setting up rates in the system.

1. Click Setup from the menu bar, then select Rates



2. Click Actions then select Setup Rate Category



3. Description - enter the name of the new Category Rate
4. Category Type
 - Category - use this option when using Dynamic Rates
 - Level - use when the category will be based on the county or accreditation of the center
 - Income - use when the category will be based on the income of the family
 - Accounting Group - this option is used when setting up Plan Options
5. Age From/Age To (Months) - if there is an age range for the category, enter the age range in months
6. Age From/Age To (Date) - for a rate category to be applied to students born between two dates, enter the start and end dates. **Please Note:** these dates may need to be updated on a yearly basis
7. Income From/Income To - if the rate is for an income level, enter the starting and ending income levels for the family
8. GL Code - enter the general ledger code assigned to the rate category
9. Revenue Type (Billing) - select the Revenue Type from the drop-down. **Please Note:** these options must be setup in System Config > Valid Values
10. Has Collapse Billing?
 - Yes - combine all the student room charges into one line of the financial statement
 - No - do not combine the room charges into one line of the financial statement
11. Is Selectable?
 - Yes - the Rate Category can be selected in the Classroom configuration screen
 - No - the Rate Category cannot be selected in the Classroom configuration screen

12. Use Dynamic Rate?

- Yes - dynamic rates should be used
- No - dynamic rates should not be used

13. Click Save
