

Room/Program - (View Semester), Plan Options

Last Modified on 01/10/2023 10:35 am EST

Plan options allow for a business to set defined day packages for parents to select during registration.

For example, if a site has a program that allows students to attend a specific set of days, each of the below would be setup as a plan option under the room.

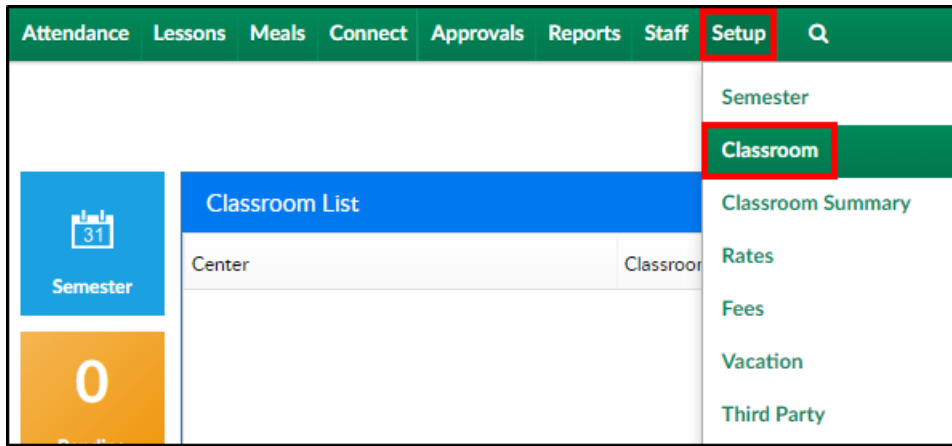
- Monday, Wednesday, Friday
- Monday-Thursday
- Tuesday-Friday

Learn how to setup plan options in this video demonstration.

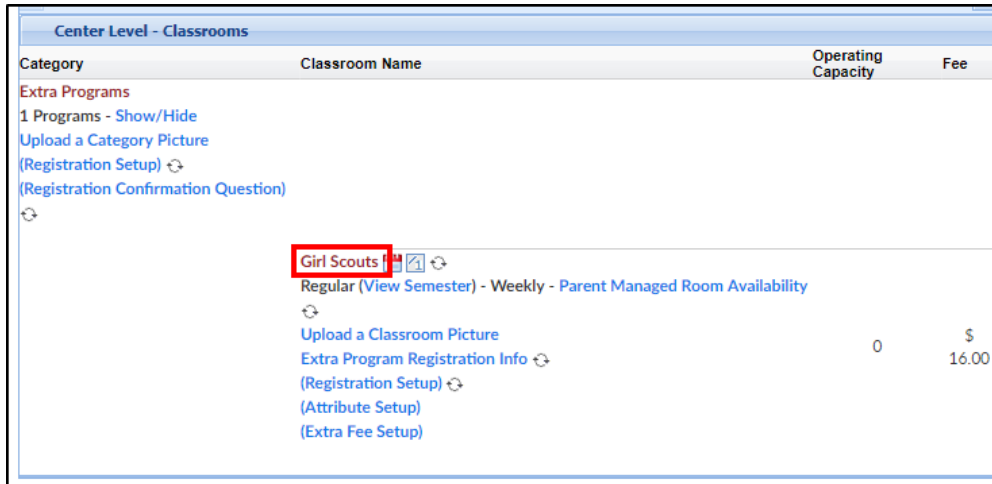
Room Configuration

For Plan Options to work with a room, there is one option that must be set.

1. Click Setup from the menu, and click Room



2. Click on the room/program name



3. Locate the Fixed Plan for all Days? option

- Yes - when a time is setup for the plan option, that time will be selected for all days
- No - parents choose a time for each day in that selected plan option

Category Configuration

- On the Category configuration screen, ensure Allow Multi-Select is set to No

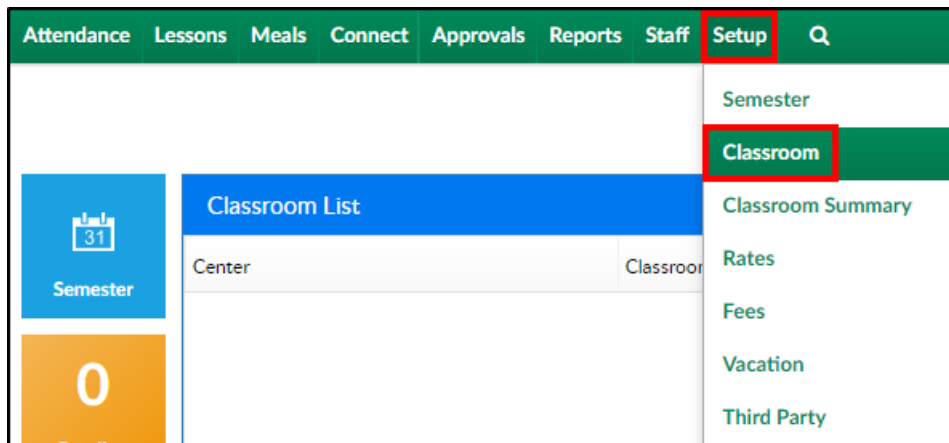


- If Yes is selected, a rate will not will not be placed in the subsequent Program/Room Assignments, see below

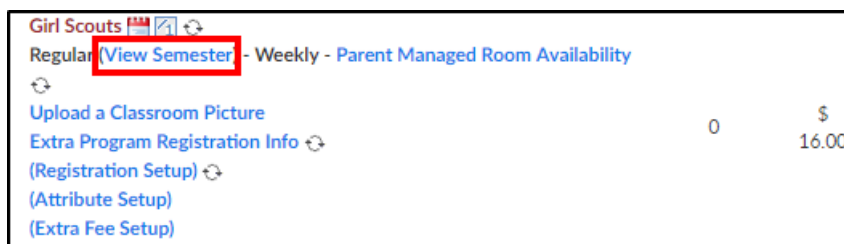
Admission/Personal		Doctor/Health		Program/Room Assignment		Calendar View		More				
Discount		Setup Discount		Special Room Note								
Active Room Assignments - Test, Testchild1												
Active	Room	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester	Create Date
<input checked="" type="checkbox"/>	Summer Camp- Week 01	06/17/2019	06/21/2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Summer Camp 5 (\$254.00)	<input checked="" type="checkbox"/>	2019 Summer	01/04/2019 08:28
<input checked="" type="checkbox"/>	Summer Camp- Week 02	06/24/2019	06/28/2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	2019 Summer	01/04/2019 08:28

Creating Plan Options

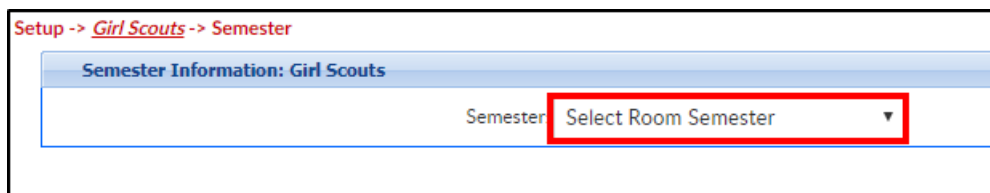
1. Choose Setup from the menu bar, then select Classroom



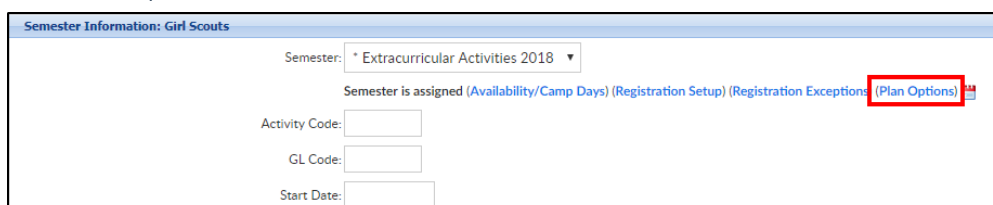
2. Locate the room/program to add Plan Options to and Click View Semester



3. Choose the Semester from the drop-down menu



4. Click Plan Options



5. Existing Plan Options will be listed under the Room Plan Options List section. Please be aware, plans are listed in the order they are added

The screenshot shows a table titled 'Room Plan Options List'. The table has columns for 'Plan Description', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Sun'. There are three rows of plan options:

Plan Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Girl Scout 3 Day Plan Option	✓		✓		✓		✗
Girl Scout 2 Day Plan Option		✓		✓			✗
Girl Scout 5 Day Plan Option	✓	✓	✓	✓	✓		✗

6. To create a new Plan Option, complete the Create/Edit Room Plan Options section

7. Plan Name/Description enter the name of the plan here

Create/Edit Room Plan Option [↗](#) Setup Room Times

Plan Name/Description

Select Rate category

Select Days:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

8. Select the Rate Category from the drop-down menu (this is an optional field). **Please Note:** If a rate Category is not selected, the default rate at the room level will be used

Create/Edit Room Plan Option [↗](#) Setup Room Times

Plan Name/Description

Select Rate category

Select Days:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

9. Choose the days to add to the plan option

Create/Edit Room Plan Option [↗](#) Setup Room Times


Plan Name/Description

Select Rate category

Select Days:

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

10. Click Setup Room Times to add room times to the plan options (optional). Room Times can also be setup on the Room [Registration Setup](#) screen. **Please Note:** For times to display during registration, "Need Times for Plans" must be set to Yes on the [Room Semester](#) screen

Create/Edit Room Plan Option 

Setup Room Times

Plan Name/Description

Select Rate category

Select Days:

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

- Type - choose Arrive/Depart

New Classroom Time for Girl Scouts

* Type:

* Day of the Week:

Arrival :

Departure :

SAVE

- Day of the Week - select the day to add a time to

New Classroom Time for Girl Scouts

* Type:

* Day of the Week:

Arrival :

Departure :

SAVE

- Arrival/Departure - select the arrival and departure times

New Classroom Time for Girl Scouts

* Type:

* Day of the Week:

Arrival :

Departure :

SAVE

- Click Save

New Classroom Time for Girl Scouts

* Type:

* Day of the Week:

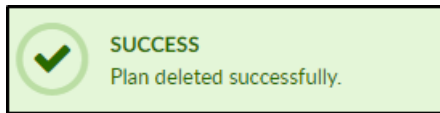
Arrival :

Departure :

SAVE

- Click Submit

13. The following confirmation message will display. To add more Plan Options, complete steps 6-9 for each option

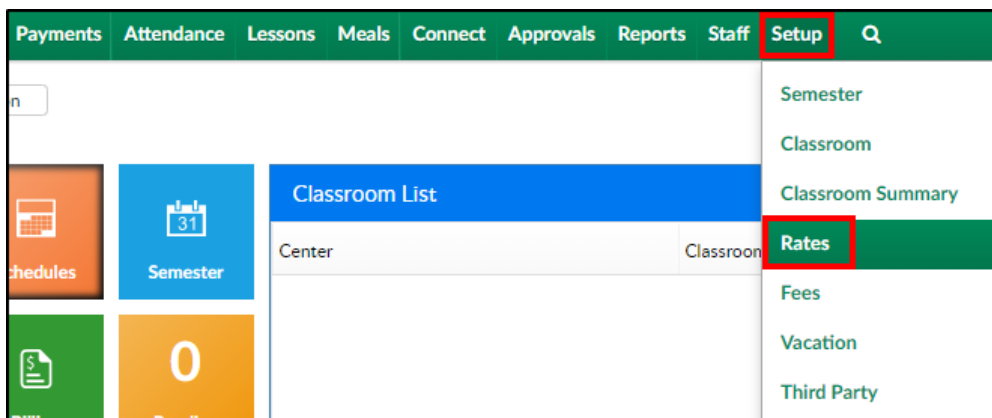


Setting Up Rate Categories

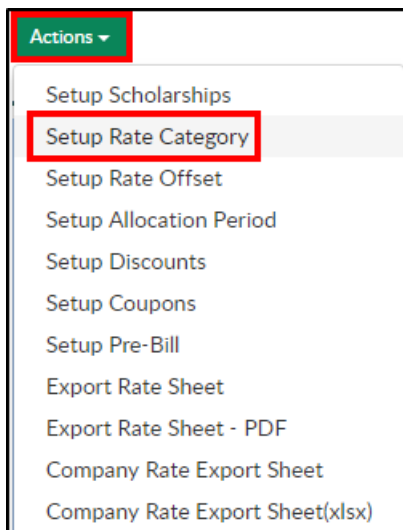
Each rate must be added to a unique Accounting Group before the rate can be associated with a Plan Option. Each Accounting Group must only have one rate associated.

To add an Accounting Group, follow the steps below:

1. Click Setup from the menu, then select Rates



2. From the Actions menu, click Setup Rate Category

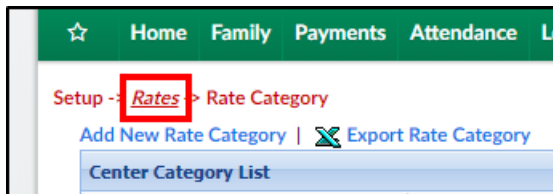


3. Complete the necessary fields in the Add/Edit Rate Category section

- Description – enter the name of the category group
- Category Type – choose Accounting Group from the drop-down menu
- GL Code – enter a general ledger code, if applicable
- Is Selectable? – choose yes to make it usable
- Use Dynamic Rates? – choose no for this category

4. Click Save

5. Navigate back to the Setup > Rates screen by clicking Rates in the top left corner



6. Add the accounting group to an existing rate or create a new rate



7. In the Setup Tuition Rate popup, locate the Accounting Group drop-down. Select the accounting group created in steps 2-4

8. Click Save

9. The new Rate Category will appear in the Select Rate Category drop-down on the Plan Options screen

Please Note: If rates are setup at the center level, go to each center and associate the account group. This would be helpful if each center has a different rate for the same program. Programs, accounting groups, and plan options can be setup at the business level, then go to the center level to add the rates.

Capacity for Plan Option Rooms

When using Plan Options, the Daily Capacity section will be considered, not the Capacity field on the [room semester](#) screen. Enter the daily capacity for each day of the week and the chart will fill in as students are enrolled. Once the day hits capacity, registration will close for that day.

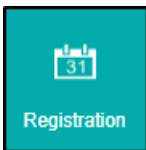
Please Note: Enter zero for unlimited students

Daily Capacity:	M	T	W	Th	F	S	S
	<input type="text" value="10"/>	<input type="text" value="15"/>	<input type="text" value="10"/>	<input type="text" value="15"/>	<input type="text" value="10"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Nbr Enrolled							
Girl Scout MTWTH (08:00 am to 05:00 pm) 0	0	0	0	0	0	0	0
Girl Scout TWTHF (08:00 am to 05:00 pm) 0	0	0	0	0	0	0	0
Girl Scout MWF (08:00 am to 05:00 pm) 0	0	0	0	0	0	0	0

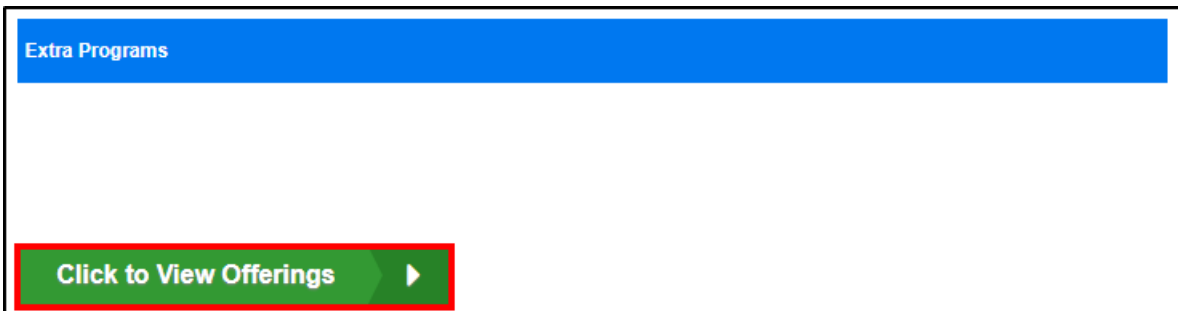
Parent Portal View

When parents are registering a student into a class with Plan Options, they will do the following:

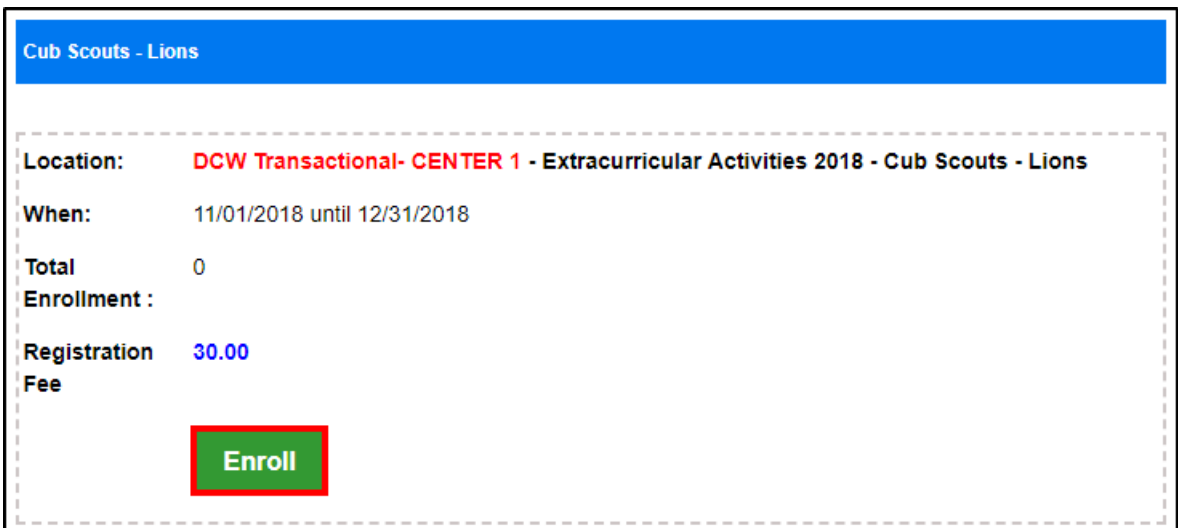
1. Log into the [Connect Portal](#)
2. Click the Registration tile



3. Locate the category and click on Click to View Offerings



4. Locate the program and click Enroll



5. Select the student and click Submit

Please select the children to register for this program X



carson miller

Submit
Close

6. Select a plan from the drop-down menu

Plan Selection

Please select a plan for enrollment

▼
Please select
★

7. Continue completing the registration form and click Add to Cart

8. Once registration is complete and approved, if necessary, the program with the selected plan option days, will display on the student's Program/Room Assignment tab within the student's record

Active Classroom Assignments - miller, carson												
Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester	Create Date
	Girl Scouts ~ DCW Transactional-CENTER 1	12/19/2018	12/31/2018	✓			✓				Extracurricular Activities 2018	12/18/2018 16:21

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