

How to Default Common Recurring Charges

Description

Use this function to set up common Recurring Charges to begin charging automatically upon move-in. This is done if there are recurring charges that all residents within a community subscribe to automatically, such as telephone or cable.

Note: Recurring Charges are associated with Primary Residents. Do not enter Recurring Charges in a Sharing Resident's profile.

Step by Step

- Navigate to the Billing Codes tab. If this tab does not appear at the top of your screen, click the plus sign (+) to the right of your tabs for a complete list of tabs.
- 2 Click on the Billing Code you would like to default

1 Billing Code 💌 Edit Delete Create New View								
New Billing Codes Change Owner					A B C D E F G H I J K L M N O P Q R S T U V W X Y Z O			
Action	Billing Code + Housekeeping L	Report Code	G/L Account No.	Stay Type	Primary GL Acc	Amount \$100.00	Offset GL	Description Housekeeping L
🗌 Edit Del	Housekeeping L		52000		<u>52000</u>	\$150.00		Housekeeping L
🔲 Edit Del	LMR				<u>21120</u>		<u>21120</u>	LMR Deferred R
🔲 Edit Del	<u>LMR</u>				<u>12020</u>		<u>12020</u>	LMR
🔲 Edit Del	<u>Meal Plan A</u>	Meals	52000		<u>52000</u>	\$500.00		Meal Plan A
🗌 Edit Del	<u>Meal Plan B</u>		52000		<u>52000</u>	\$700.00		Meal Plan B
🔲 Edit Del	<u>Meal Plan C</u>		52000		<u>52000</u>	\$900.00		Meal Plan C
🔲 Edit Del	Move-in Incentive		52000		<u>52000</u>			Move-in Incentive
🔲 Edit Del	<u>Permanent</u>	Basic Rent	55430	Permanent	<u>55430</u>		<u>55430</u>	Permanent
🗌 Edit Del	<u>Respite</u>	Basic Rent	12020	Respite	<u>12020</u>	\$65.00		Respite
🗌 Edit Del	<u>Salon</u>		78789		<u>21120</u>	\$25.00		Salon
🔲 Edit Del	Service	Care and Services	52000		<u>52000</u>	\$2,000.00	<u>52000</u>	Service
🗌 Edit Del	Sharing (Double Occupancy	55430		<u>55430</u>	\$1,325.00		2nd Occuppant
📃 Edit Del	Telephone				<u>55430</u>	\$0.00		Telephone 🧳 🥒
🔲 Edit Del	Trial Stay	Basic Rent	12020	Trial Stay	<u>12020</u>	\$0.00		Trial Stay
E care est	10/1-1-1 OL-11	D	40000	148-14-1 O4-11	40000	#00.00		148-44-1 O4-11

- **3** Hover over Prices in the baby words at the top of the page
- 4 Click New Prices
- **J** In **PR Name**, enter a description. If you are setting up prices for multiple communities, include the name of the community in the description (e.g., Telephone Palm Springs)
- **6** Specify the **Community**

Updated: October 29, 2013



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- 7 Enter an Amount
- 8 Click the **Default** checkbox
- 9 Click Save
- **10** Repeat steps 3-9 for each community