

How to Enter and Maintain Recurring Charges

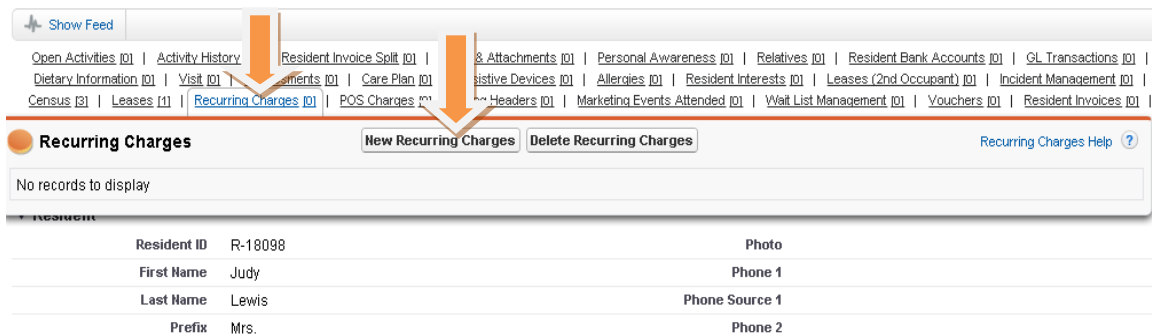
Description

Use this function to set up Recurring Charges for Primary Residents in your Community. These can also include recurring credits, such as rental rebates and wellness credits.

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

Step by Step

- 1 Navigate to the Resident's profile
- 2 In the baby words at the top of the screen, hover over *Recurring Charges*
- 3 Click on **New Recurring Charges**



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Recurring Charges |
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No records to display

Resident ID	R-18098	Photo
First Name	Judy	Phone 1
Last Name	Lewis	Phone Source 1
Prefix	Mrs.	Phone 2

- 4 Specify a **Billing Code**
- 5 Enter the **Price**
- 6 Specify a **Start Date**
- 7 Specify a **Community**
- 8 Click **Save**

Enter and Maintain Recurring Charges

Information	
Resident_ID	R-18098
Billing Code	Foot Care
Description	
Quantity	1.00
Price	15.00
Tax Code	
Owner	Larry Wieskopf
Update Invoice	<input type="checkbox"/>
Dates	
Start Date	7/17/2013
End Date	
Invoice Information	
Billing Invoice No	
Last Bill Date	7/17/2013
Previous Last Bill Date	7/17/2013
Billing Run	
System Information	
Community	iaRetirement - GTA

- 9 To end a recurring charge, hover over *Recurring Charges* in the baby words at the top of the Resident's profile page
- 10 Click the **Audit Number** of the charge you would like to modify
- 11 Specify an **End Date** for the recurring charge
- 12 Click **Save**

Recurring Charges Detail	
Audit No.	AS-000014
Community	iaRetirement - GTA
Resident_ID	R-10081
Resident Name	Dr. John Adams
Billing Code	Service
Description	Service
Quantity	
Price	
Update Invoice	<input type="checkbox"/>
Dates	
Start Date	1/17/2012
End Date	9/27/2013

