

Back-to-School Billing Readiness Checklist

 **brightwheel**
Tools and Templates

What experienced childcare directors do before new families arrive – and what most programs wish they'd done sooner.

7 hrs

per week spent on manual
billing admin on average

5-10%

typical gap between billed
and collected revenue

30 mins

to get fully setup with
brightwheel's team ✨

Back to school is the most financially consequential window of your year. Programs that walk into the new school year with billing fully in place collect more on time, spend less time chasing payments, and have fewer uncomfortable conversations at drop-off. **This checklist covers what experienced directors do differently — and what first-timers usually learn the hard way.**

Communicate your rates & policies before families commit

Goal: Make sure every family knows exactly what they owe, when it's due, and what happens if they don't pay — before their child's first day.

***Why this matters:** The number one source of billing disputes isn't families who can't pay — it's families who say they didn't know. Directors who cover payment expectations at orientation have far fewer awkward drop-off confrontations in September. And the first time you tell a family a late payment is "no big deal," you've set a norm that's very hard to reverse.*

Action steps:

- Send rate increase notice 4-6 weeks early – never via cubby note or at pickup
- Update tuition agreements to reflect new-year rates before re-enrollment opens
- Include late fee amount, grace period & accepted payment methods in writing
- Cover payment expectations verbally AND give a written copy at orientation
- Show families where in your parent handbook the policy lives
- Ask families to sign and acknowledge the policy

\$25

average late fee
amount

✔ With brightwheel

Brightwheel's digital tuition agreements let families sign and add their payment method in one step, so every family enters the year with confirmed payment setup before their child's first day. No separate payment collection step, no chasing down forms.

Get every family's payment method on file before day one

Goal: Have 100% of families enrolled in autopay or with a payment method on file before the first invoice is due.

Why this matters: Families who pay by cash or check in month one almost never transition to autopay later. Programs operating on 5–10% margins can't absorb even a handful of late payments — and late payments are almost always predictable from the enrollment process.

Action steps:

- Require autopay as part of the enrollment process – not as an optional follow-up
- Send payment setup link in enrollment confirmation – not separately later
- At orientation, confirm that every family has added their payment method
- For returning families, confirm saved methods are still active
- Follow up with anyone who hasn't enrolled 1 week before first invoice

7+ hrs/wk

spent on billing tasks when relying on manual reminders and cash/check collection

Next day

Receive your deposits by the next business day in brightwheel 🙌

Get paid faster →

Collect deposits at enrollment – not after

Goal: Secure financial commitment from every family before their child's first day, as part of the enrollment process itself.

Why this matters: The families who do not attend in August are almost always the ones who never paid a deposit. Collecting at the point of enrollment, when motivation is highest, is the single most effective way to reduce no-shows.

Action steps:

- Decide deposit amount, refund policy, and whether it applies toward the first month's tuition
- Include your deposit in the enrollment packet so families pay at submission – not separately after
- Put your deposit refund policy in writing – families will ask
- Track every deposit in one place – not a spreadsheet on someone's desktop
- Set a deposit deadline – families who haven't paid are not confirmed

✔ With brightwheel

Brightwheel lets you add a registration or submission fee directly to your enrollment packet – families pay the deposit at the moment they submit, before you've accepted them. No separate invoice, no follow-up required. Deposits are tracked automatically in your billing dashboard.

Know what you're actually collecting before the new year

Goal: Reconcile last year's billing before new invoices begin — so you're not carrying hidden gaps into the new school year.

Why this matters: One advisory firm found a program confident they were collecting \$187K/month that, when reconciled against actual bank deposits, was significantly short. With margins typically below 10%, a 5–8% gap isn't a rounding error — it's the difference between a profitable year and a painful one.

Action steps:

- Run an outstanding balances report for the previous year – decide on each open balance
- Compare what you billed vs. what actually deposited – flag any unexplained gap
- Check for families whose payment methods failed and were never updated
- Reconcile subsidy payments separately – agencies often pay 30–60 days behind
- Set a recurring monthly time to review your billing dashboard

✓ With brightwheel

Brightwheel gives you a real-time billing dashboard – outstanding balances, payment history, and deposits in one place. Your billing specialist reviews this with you during onboarding so you start the year knowing exactly where you stand.

[Get more visibility →](#)

Set up automatic late fees before the first invoice – not after

Goal: Have your late fee policy documented, communicated, and turned on before the first payment is ever due.

Why this matters: Directors who are inconsistent about late fees report that it becomes a culture problem, families learn the policy is negotiable. The first time you say "it's fine," you've made it fine. Setting and automating the policy before the year starts removes emotion from enforcement entirely.

Action steps:

- Define your late fee amount (\$10–\$25) and grace period (3–5 days is standard)
- Decide whether fees compound for ongoing overdue balances
- Include the policy in your tuition agreement – families sign off before billing starts
- Automate late fee enforcement – don't rely on manual tracking or memory
- Train staff on when to waive a fee – and when not to
- Never signal that fees are optional – consistency makes them effective

✔ With brightwheel

Your billing specialist configures your late fee policy during setup – amount, grace period, and escalation rules. After that, brightwheel enforces it automatically every night with no action required from you.

[Automate your late fees →](#)

✘ Without a system

Programs tracking late fees manually report inconsistent enforcement – it's easy to let a fee slide when you'd have to create the invoice yourself. That inconsistency erodes the policy over the course of a year.

Start the Year Strong

A financially organized program is a less stressful program. When billing is set up before new families arrive, the conversations at drop-off are about children – not about missing payments. The five steps in this checklist are what experienced directors do every back-to-school season.

Ready to get billing set up before back to school?

Our billing specialists walk through every step with you. Most programs are fully live in under 30 minutes – before new families arrive. Billing is already included in your brightwheel Premium plan.

[Talk to a billing specialist](#)

Additional resources

Download these additional checklists and templates to support your program.

- [Payment policy guide + template](#)
- [Collecting overdue tuition with care](#)
- [How to write a tuition increase letter](#)
- [Financial metrics every director should track](#)