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Setup > Semester Deployment - Dec 2018

Last Modified on 12/19/2018 12:39 pm EST

We've recently updated some of the options related to semester setup. The articles below will explain the new Setup > Semester screens and assist in the setup process.

Please Note: Going forward, semester settings may calculate registration fees differently. Please review current and future semester settings to ensure they will bill properly.

- Setup > Semester
    - Setup > Semester, Room/Program
        - Click here to view Registration Fee Examples
    - Setup > Semester, Semester Family
    - Setup > Semester, Semester Participant
    - Setup > Semester, Semester Family & Room/Program

If you were unable to attend the Semester and Fee Setup Refresh Presentation, below are the slides for your reference.

Setup Semester PPT.pdf 📎

System Notifications

Last Modified on 12/31/2018 9:04 am EST

As features are added or updated in the system, links to documentation are below.

If you have additional questions or require assistance, please contact our Care team!

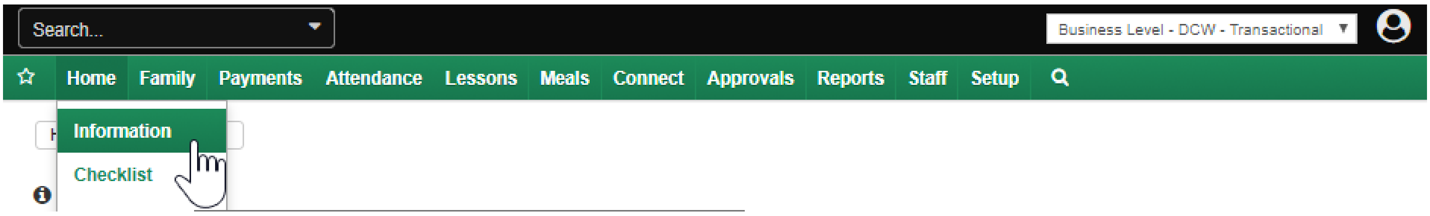
Date	Feature
12/17/2018	Sequential rate category- under the setup > rates screen > actions > rate category users are now able to number rate categories to display in a particular order
12/17/2018	Check in priority indicator- if children should automatically check into camp type rooms be sure the priority option is selected under the setup > room > select room name, then scroll to the collect attendance field (set to yes or priority)
12/17/2018	Remove closed days on parent managed calendars when closed due to capacity- if a parent managed calendar day has reached capacity parents will now be able to remove the day (if the remove days option is selected on the setup > system config > general config > daycare works family tab screen)
12/17/2018	Disable remove button for particular parent managed calendars - • A new field has been added to "Allow Days to be removed" at the room category level, this will turn on or off the remove days option by category of calendars for parents in the Connect Portal. ○ If General Config setting "Allow Days to be removed" is set to Yes, then look to room category level setting to determine if remove option is available for that room category. If room category level config is set to yes, then remove is available for that room. If room category level config is set to no, then remove option is not available for that room. ○ If General Config setting "Allow Days to be removed" is set to No, remove is disabled for all rooms for that business level/center level
	Update existing schedules with semester dates - from the setup > semester screen within the Semester Summary users have the option to apply semester date changes to existing student schedules ▪ Yes button: "Update all schedules", if selected all children with active PRAs for

12/17/2018	this room-semester will be changed to reflect new start or end time saved for this room-semester ■ No button: "Don't update schedules", if selected all children with active PRAs for this room-semester will maintain the start or end times
12/17/2018	Document Checklist - required document types can be added from the setup > system config > child docs screen, this allows admin level users to see if business defined required documents have been added for individual children under the family record > child tab > more > documents/checklist option
12/17/2018	Mobile App Configuration Screen - consolidated the location of mobile app configuration on the admin side of the site- setup > system config > mobile apps
12/17/2018	Re-labeled the Capacity Fields on the classroom configuration (setup > classroom) screen to 'Licensed' and 'Operating', use the Operating Capacity field for ratio functions within the system
12/17/2018	A new filter has been added on the payments > outstanding screen for Children with Active Schedules

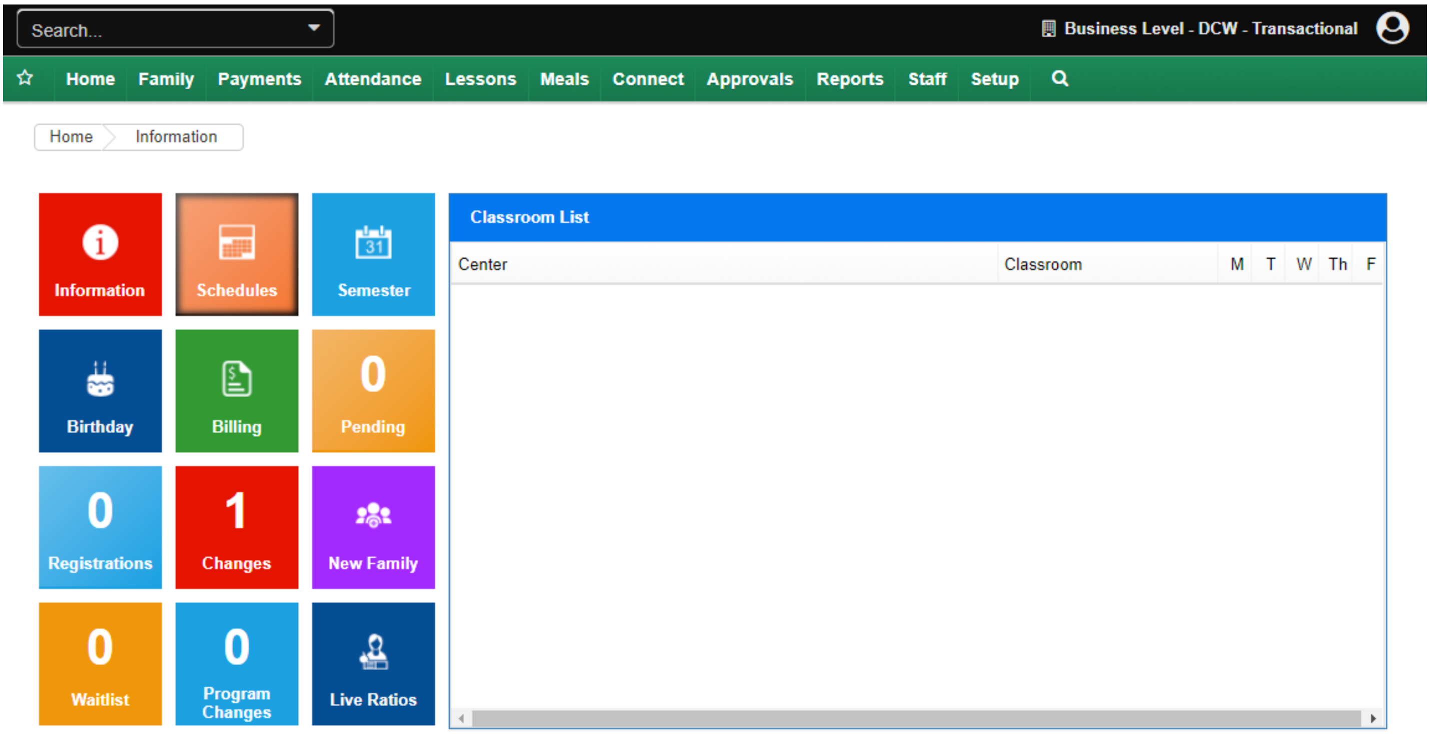
Home Screen Overview

Last Modified on 10/24/2017 8:27 am EDT

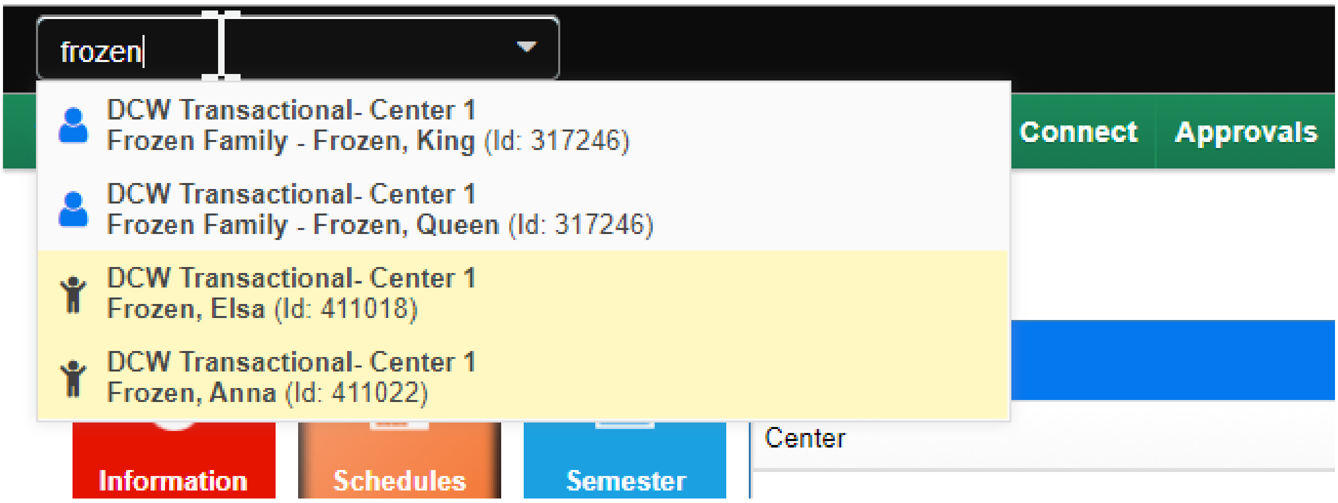
When first logging in, the initial screen that will display is the Home > Information page. From this page users are able to see basic information within the tile area, approve registrations, child change requests, program change requests, add families and run billing. At any time users can return to this page by selecting the home menu , then selecting the information option.



At the very top of the screen you will see the menu bar, this bar will display as you navigate through the system. To the left you will see a search bubble. In the search bubble you can enter a child's first name, last name, parents first name, parents last name, family name, family ID or child ID. When you start typing results will begin to display- you must enter at least three characters for results to display.



When viewing the search results, the parent/guardian results will display in white, if you click on one of the white records you will be taken to the family's financial screen. The children that match the search criteria will display in yellow, if you select one of the children you will be taken to the child screen in the family's record. Only active families will display when using this search feature.


frozen

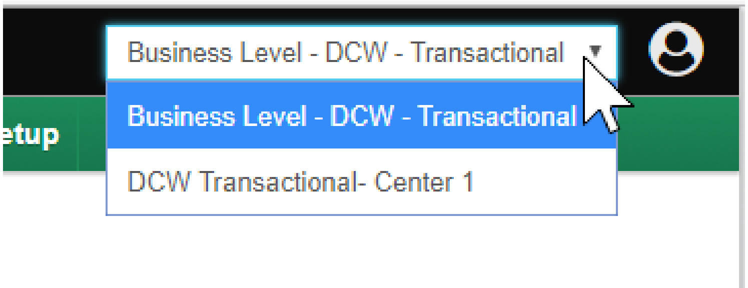
DCW Transactional- Center 1
Frozen Family - Frozen, King (Id: 317246)

DCW Transactional- Center 1
Frozen Family - Frozen, Queen (Id: 317246)

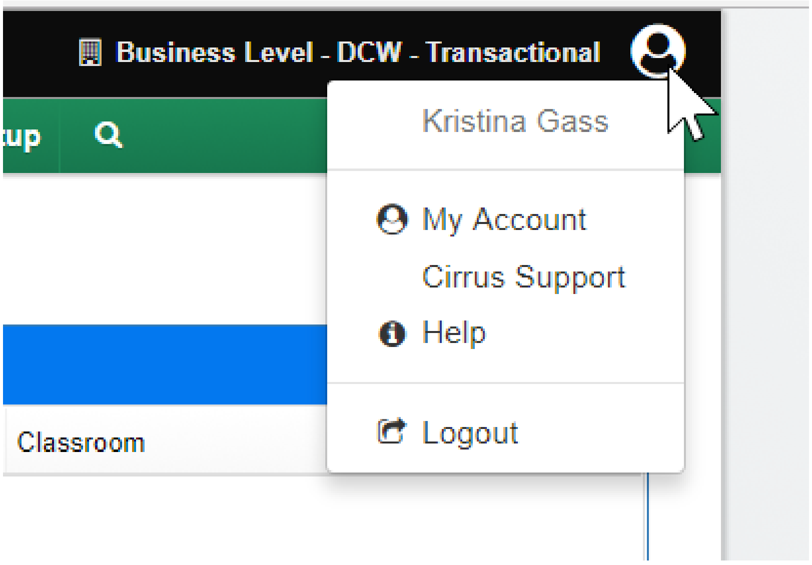
DCW Transactional- Center 1
Frozen, Elsa (Id: 411018)

DCW Transactional- Center 1
Frozen, Anna (Id: 411022)

To the very right on the black bar, you will see the center or business level name where you are signed into. If you have access to multiple sites you will see a drop down list where the site name is, this is how you will navigate between business level and center/site levels.



The last icon on the black bar is the user icon. When you click on the icon, a menu will display, the first line shows the name of the user that is currently logged in.

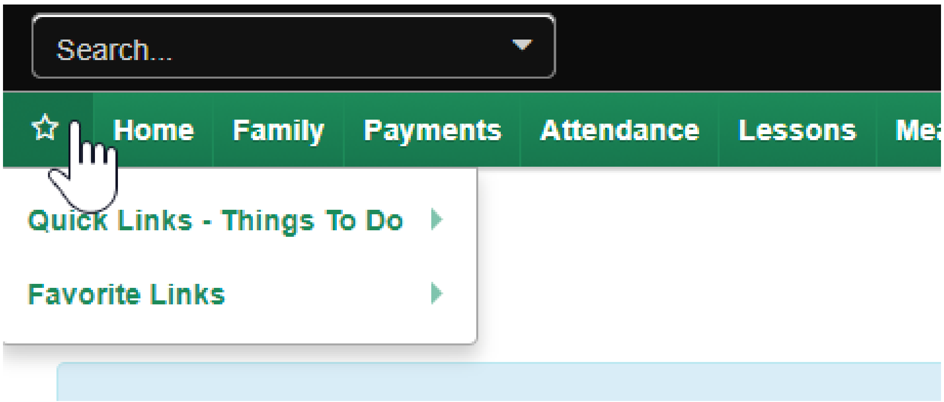


If you would like to see an overview of your user account click on the My Account link.

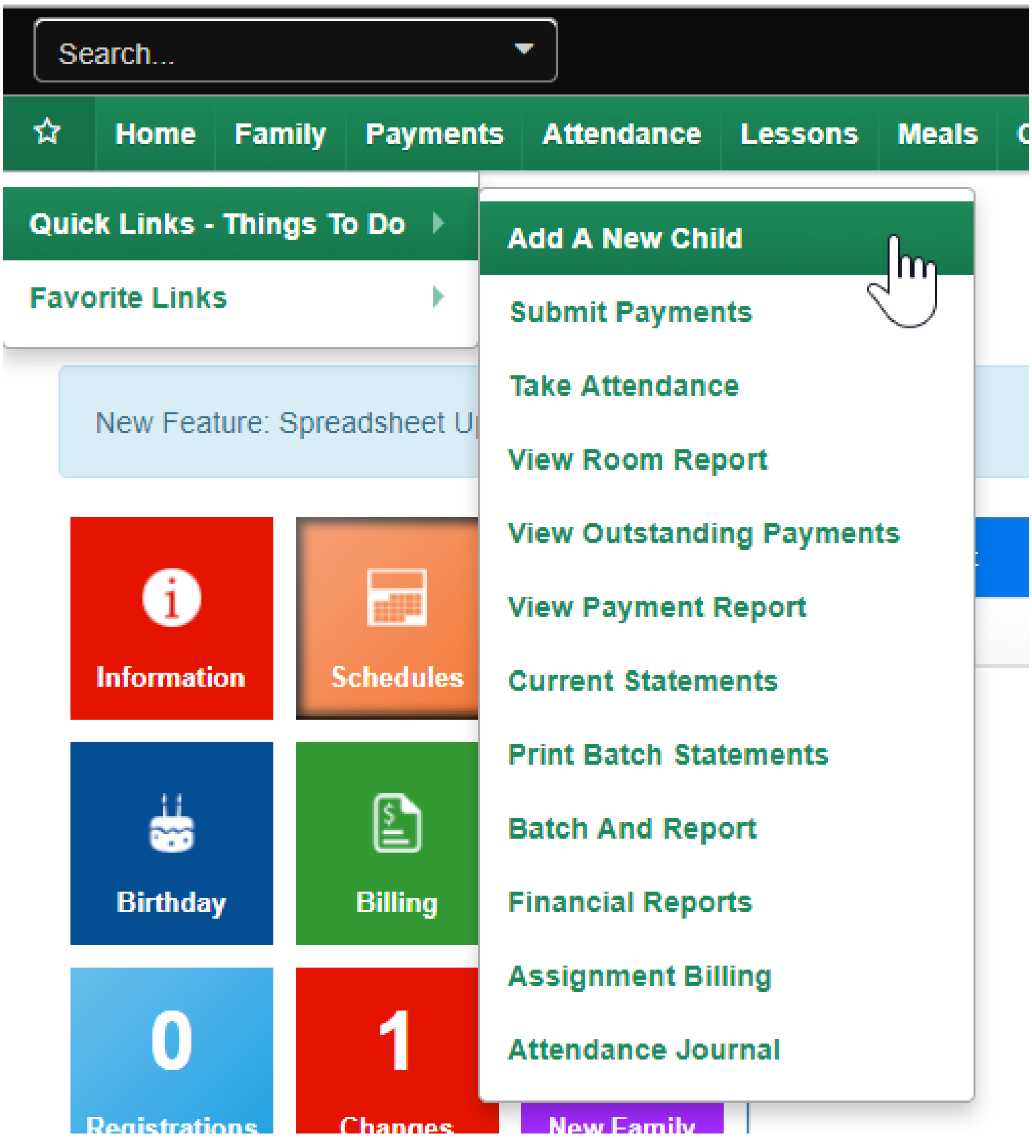
If you need additional help and would like a quick link to the help documentation, select the Cirrus Support Help line.

At the end of the day, this is also where you are able to logout.

Below the header bar you will see the main menu, the first feature is a star icon- when you click on the star, there are two options.



The first option is Quick Links- Things to Do, these are commonly preformed tasks users will find themselves doing on a regular basis.

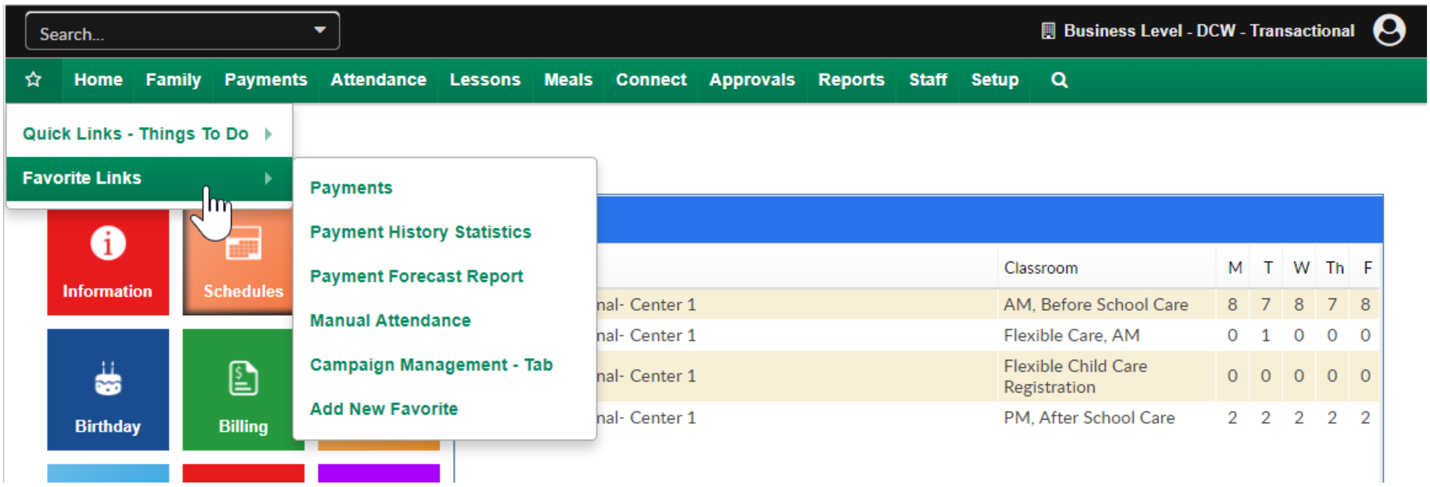


- Add A New Child- a shortcut to add a new family to the system
- Submit Payments- links to the Payment > Journal page where you are able to receipt payments
- Take Attendance- allows a user to take or edit attendance from the Attendance >

Entry page

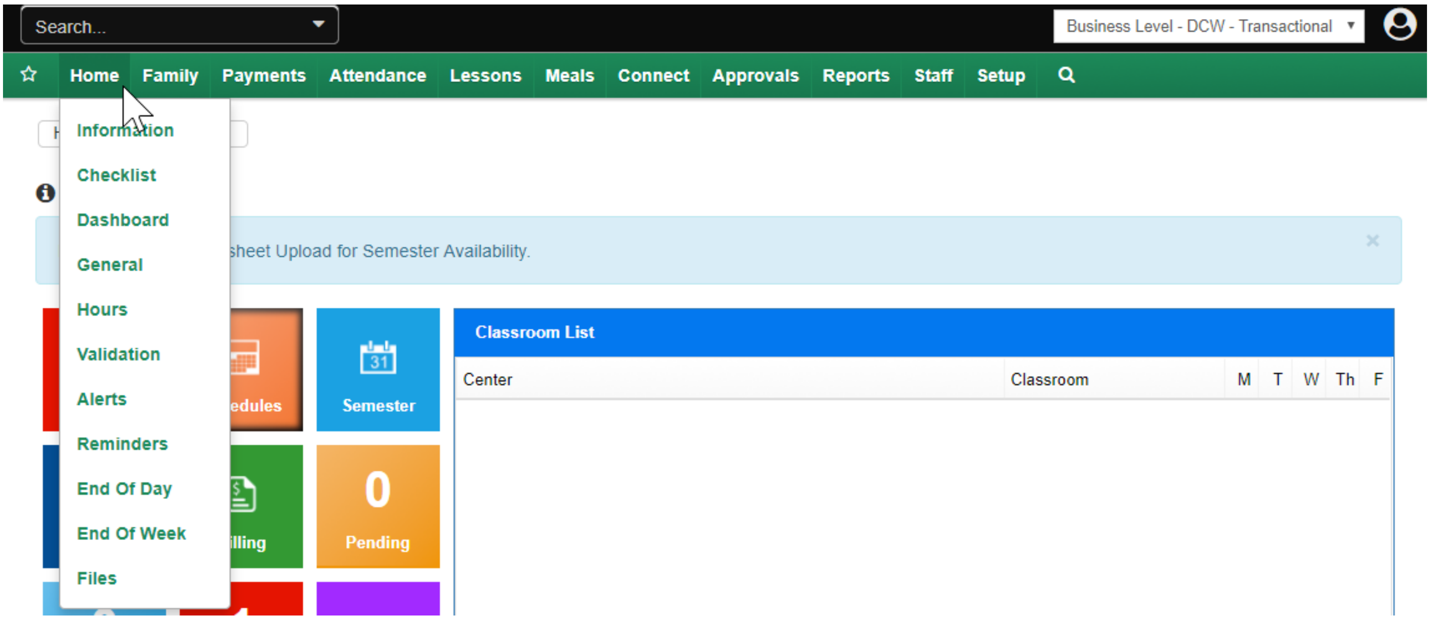
- View Room Report- a shortcut to the Reports > Room/Program page where child, family and staff reports can be accessed
    - Rosters & Sign In Sheets
    - Staff and Child Attendance Sheets
    - Health & Allergy Reports
    - Staff Details
- View Outstanding Payments- a shortcut to the Payments > Outstanding page, filter on outstanding credits/debits to view related families.
- View Payment Report- a shortcut to the Payments > Payments screen, here users can view payments that have received with in a particular time frame, search by payment method and pull reporting of results
- Current Statements- Creates a PDF version of current statements that can be accessed by selecting the Print Batch Statements link.
- Print Batch Statements- Allows users to create and access PDF statements
- Batch and Report- Users are able to batch payments together to match what has been sent to the bank or received on a bank statement
- Financial Reports- a shortcut to the Reports > Financial screen where financial reports can be created
    - Revenue Reports
    - Accounts Receivable Reports
    - General Ledger Posting Reports
- Assignment Billing- a screen that allows users to do a billing audit for a defined period of time
- Attendance Journal- a shortcut to the Attendance > Attendance Journal page, all check ins/outs can be viewed for a period of time. This page will also display any errors that may have occurred

The next option allows users to select their own pages to favorite. To add a favorite select the star icon, then hover over Favorite Links, select the Add New Favorite option.



	Classroom	M	T	W	Th	F
nal- Center 1	AM, Before School Care	8	7	8	7	8
nal- Center 1	Flexible Care, AM	0	1	0	0	0
nal- Center 1	Flexible Child Care Registration	0	0	0	0	0
nal- Center 1	PM, After School Care	2	2	2	2	2

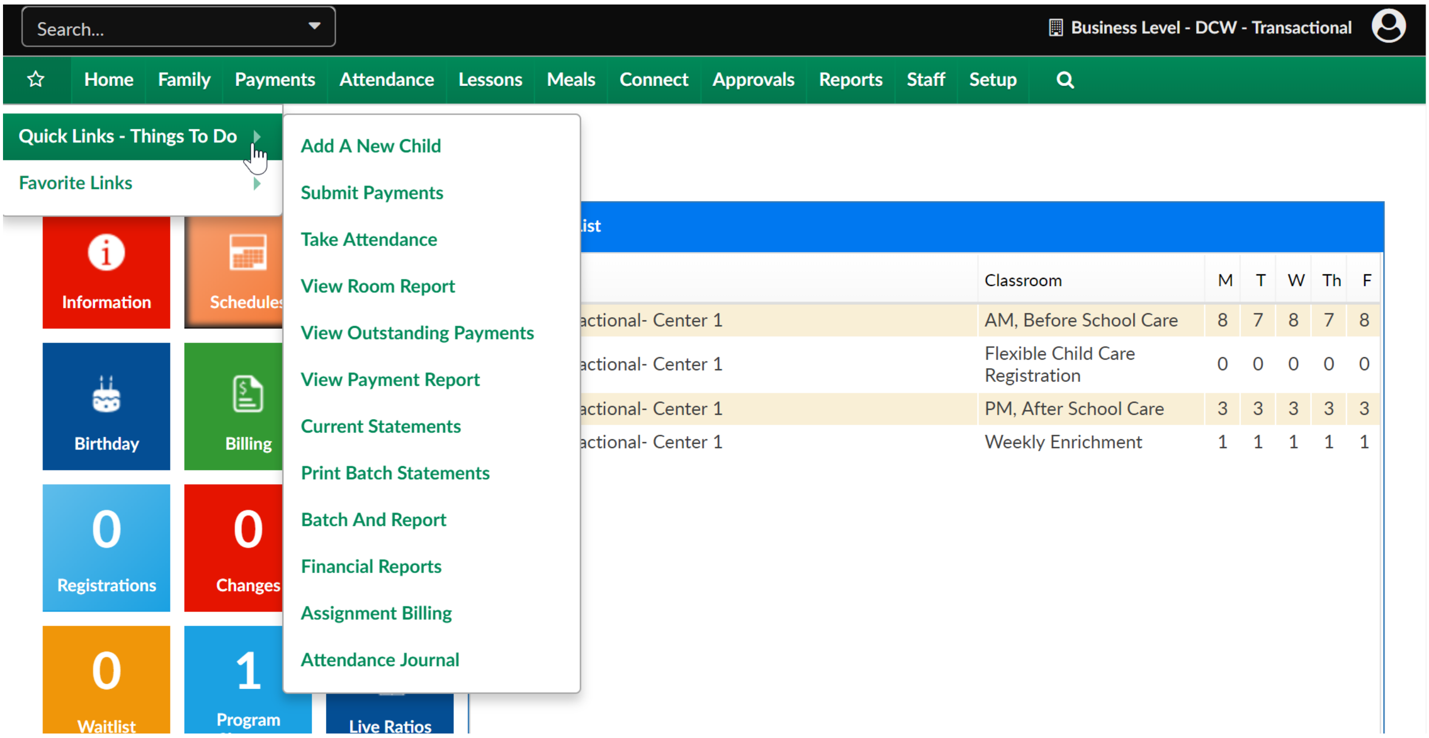
When you click on each of the headers you will see available pages. To see an overview of each tab- select the System Walk Through option to the left. Each main menu option has it's own page and will provide additional detail.



Quick Links- Things to Do

Last Modified on 02/09/2018 9:57 am EST

From the menu bar select the star icon, hover over the Quick Links- Things to Do option.



	Classroom	M	T	W	Th	F
actional- Center 1	AM, Before School Care	8	7	8	7	8
actional- Center 1	Flexible Child Care Registration	0	0	0	0	0
actional- Center 1	PM, After School Care	3	3	3	3	3
actional- Center 1	Weekly Enrichment	1	1	1	1	1

From anywhere in the system users are able to select this list and jump to the actions listed below.

- Add a New Child - add a new family to the system
- Submit Payments - receipt payments from the Payments > Journal screen
- Take Attendance - take attendance for a classroom Attendance > Entry screen
- View Room Report - pull room/program reports from the Reports > Room/Program screen
- View Outstanding Payments - send outstanding balance emails, add late fees or pull balance reports
- View Payment Report - pull a report displaying payments that have been receipted during a user defined time frame
- Current Statements- select this link to batch create current statements in a PDF file. Go to Print Batch Statements to open the file.
- Print Batch Statements- download PDF files of statement batches

- Batch and Report- group received payments together to make bank reconciliation easier
- Financial Reports - pull revenue, balance and ledger reports from the Reports > Financial screen
- Assignment Billing
- Attendance Journal - review clock ins/outs and see any errors that may have occurred from the Select or Provider InSite Applications.

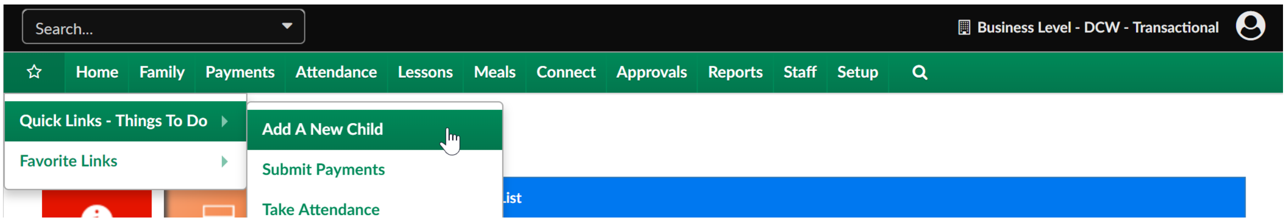
Quick Links- Add A New Child

Last Modified on 05/30/2018 2:23 pm EDT

Families/New Children can be added to a center/site several ways.

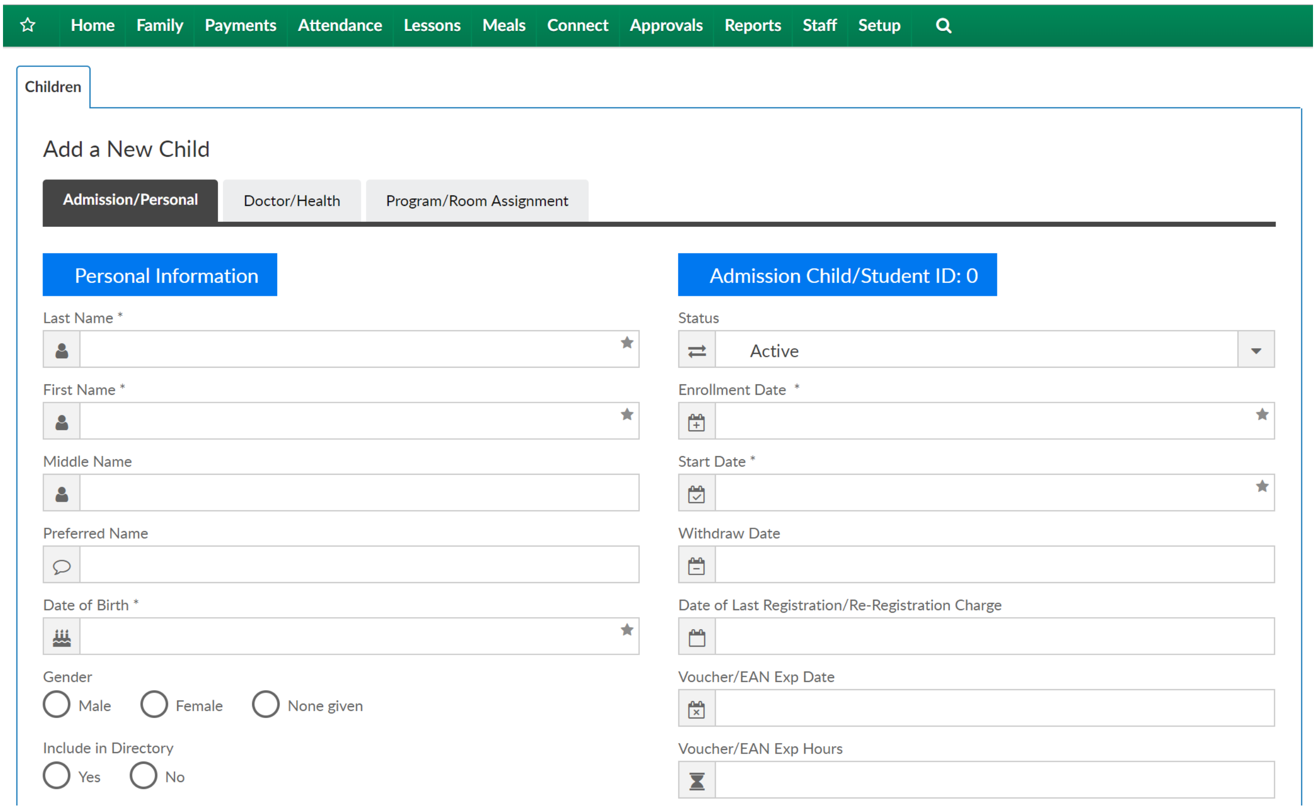
1. Through the center's new registration page- parents/guardians must add all detail and submit payment (in most cases) before their submission is sent to the center. The family would be approved into the center by a staff or admin user from the Home > Information, Registration tile or the Approval > Registration menu option.
2. Once a family is in the system for a school, the option to allow parents to add new children can be enabled on the family portal (connect.schoolcareworks.com or family.daycareworks.com). One the child's detail is entered into the system the child will need to be approved into the system from the Approval > Child screen .
3. The family or child can be added to the system from the admin side of the system (schoolcareworks.com or daycareworks.com).

To add a new family to the system from the admin side select the star icon from the home screen, then select the option to Add a new child.



This will open an empty child record. The first step in creating a family record is to add a child. The ONLY detail that is required to add a child is marked with an *. All of the other fields are not mandatory- it will be up to a center what is required when a staff or admin user manually adds a child to the system.

- Last Name
- First Name
- Date of Birth
- Start Date- date the child will begin at the site
- Enroll Date- date the child registered

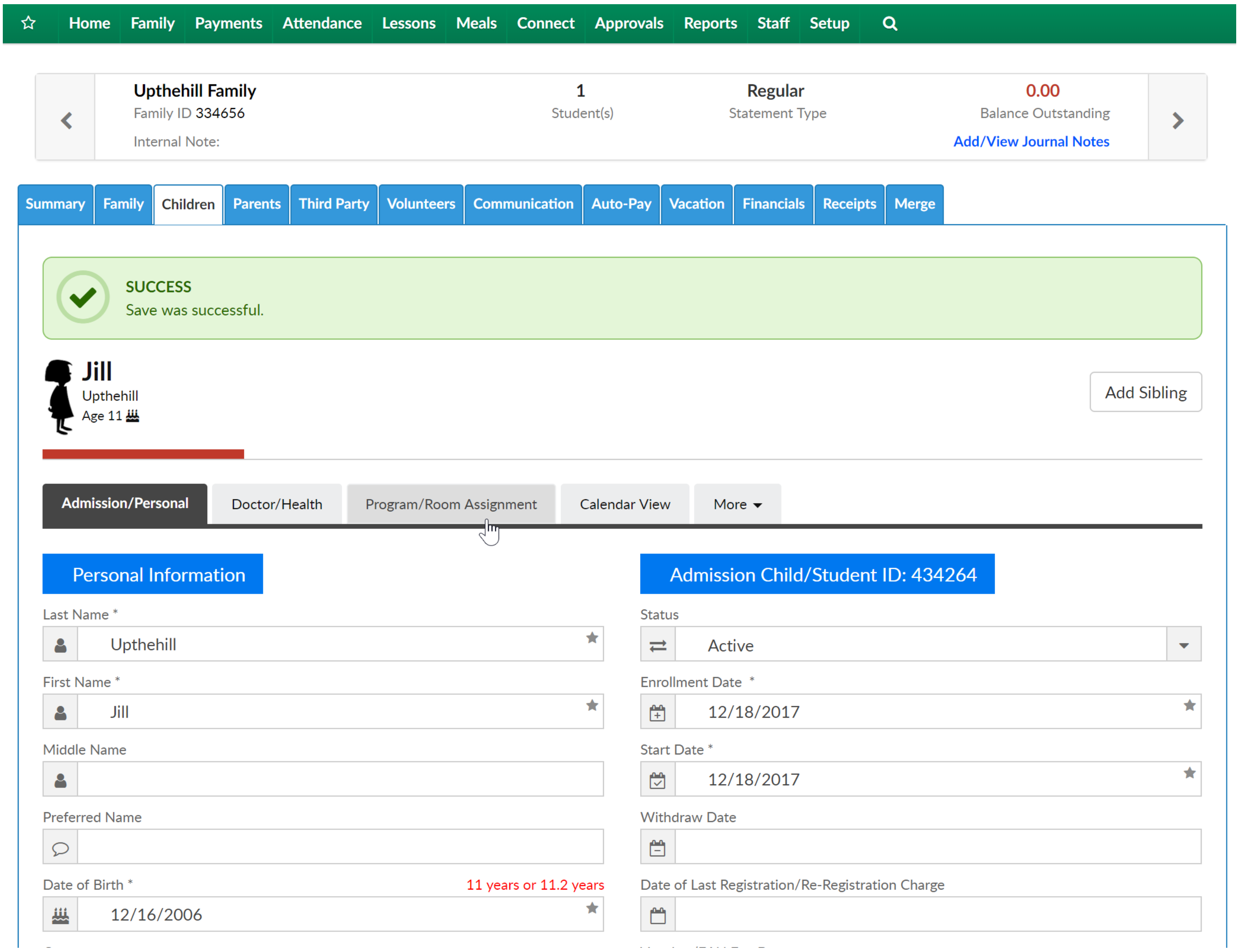


Admission Child/Student ID: 0

Status: Active

Once this information is entered into the system press **Save**.

After pressing Save, the family record will expand and additional fields will display. The staff or admin user should enter available information to the Doctor/Health tab, add a program/room assignment for the child and add any Parent information on the Parent/Guardian tabs for Parent 1 and Parent 2. Be sure to scroll to the bottom of the page and press Save on each page before moving onto the next screen.



Upthehill Family
Family ID 334656
Internal Note:
1 Student(s)
Regular Statement Type
0.00 Balance Outstanding

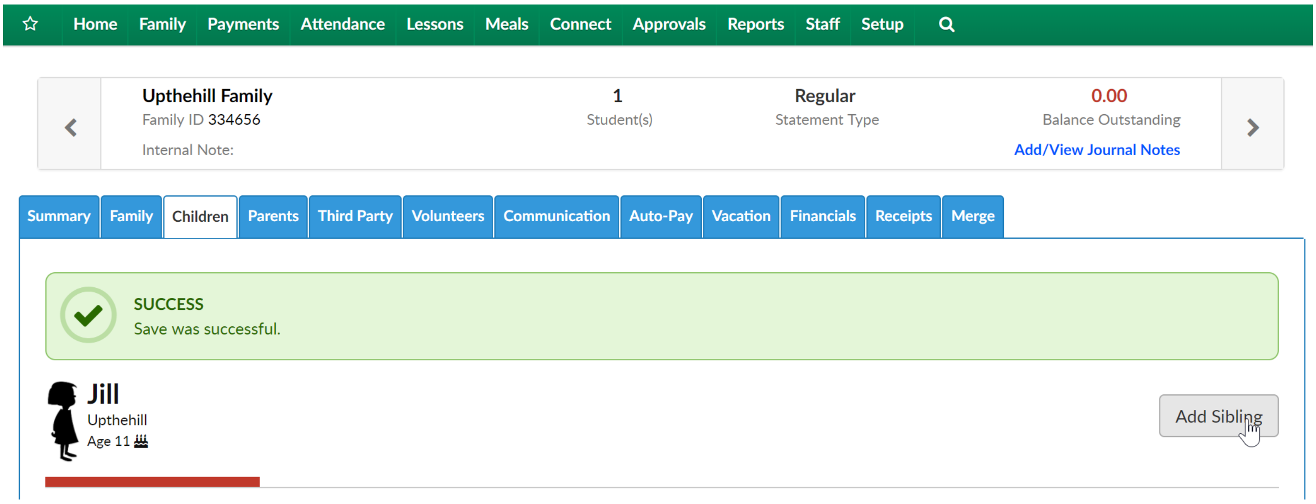
SUCCESS
Save was successful.

Jill
Upthehill
Age 11

Admission Child/Student ID: 434264

Last Name *: Upthehill
First Name *: Jill
Middle Name:
Preferred Name:
Date of Birth *: 12/16/2006 — 11 years or 11.2 years
Status: Active
Enrollment Date *: 12/18/2017
Start Date *: 12/18/2017
Withdraw Date:
Date of Last Registration/Re-Registration Charge:

To add a child to an existing family select the Add Sibling button.

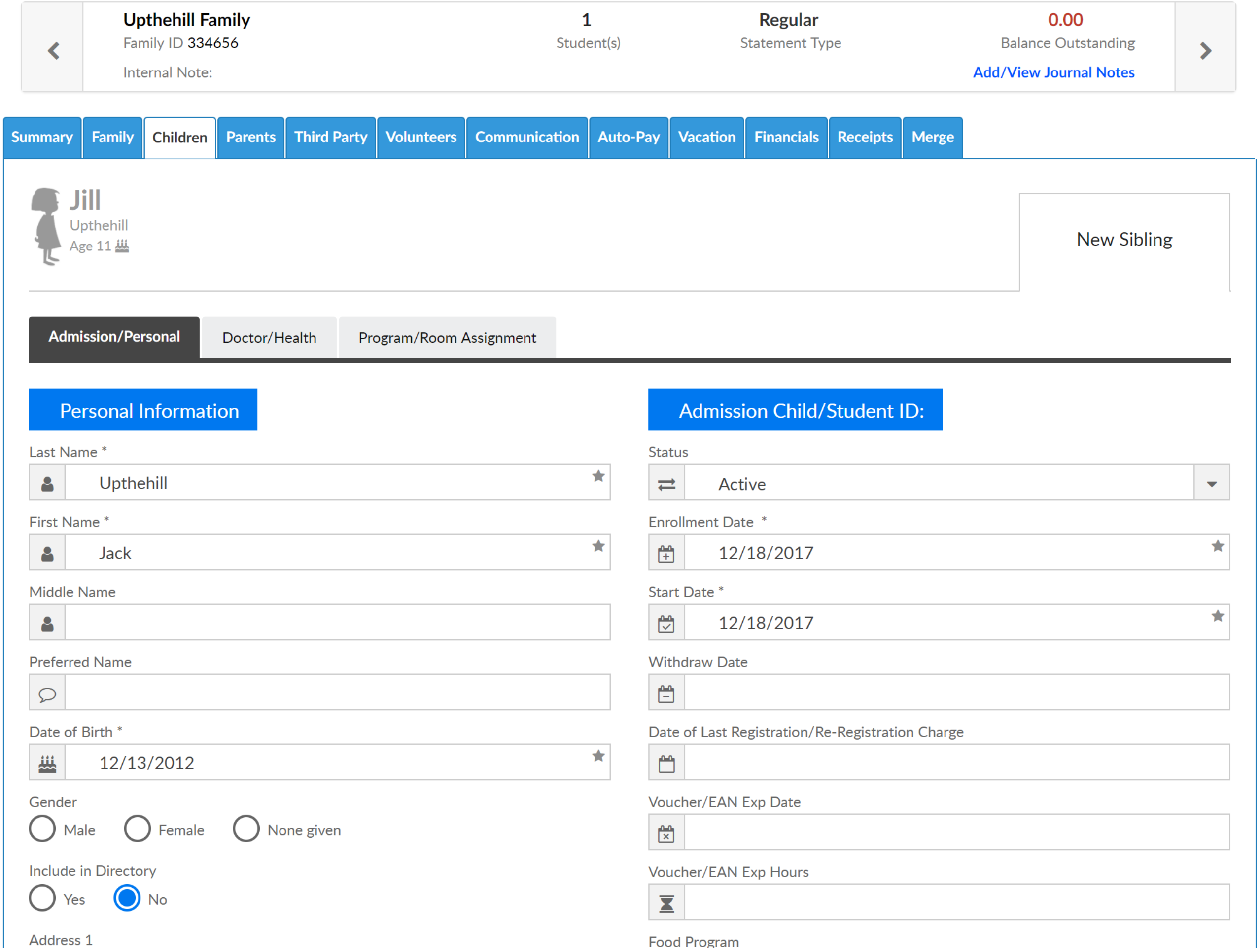


Upthehill Family
Family ID 334656
Internal Note:
1 Student(s)
Regular Statement Type
0.00 Balance Outstanding

SUCCESS
Save was successful.

Jill
Upthehill
Age 11

Enter required and optional information as available, then scroll to the bottom of the page and press Save.



Upthehill Family
Family ID 334656
Internal Note:

1 Student(s)
Regular Statement Type
0.00 Balance Outstanding

Jill
Upthehill
Age 11

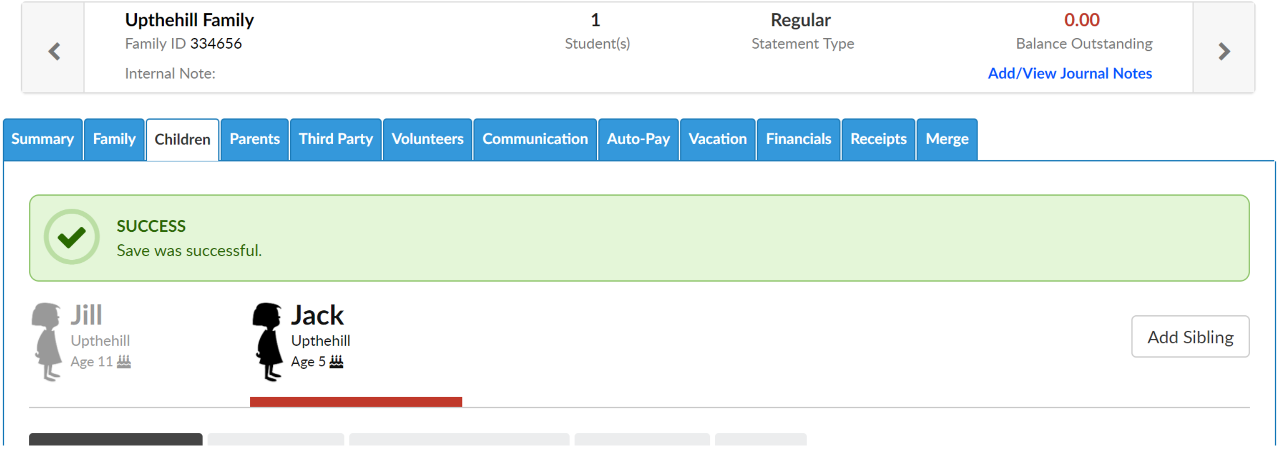
Personal Information

Last Name *: Upthehill
First Name *: Jack
Middle Name:
Preferred Name:
Date of Birth *: 12/13/2012
Gender: ○ Male ○ Female ○ None given
Include in Directory: ○ Yes ● No
Address 1

Admission Child/Student ID:

Status: Active
Enrollment Date *: 12/18/2017
Start Date *: 12/18/2017
Withdraw Date:
Date of Last Registration/Re-Registration Charge:
Voucher/EAN Exp Date:
Voucher/EAN Exp Hours:
Food Program

Once saved a confirmation box will appear and the new child will have an icon display next to the original child.



Upthehill Family
Family ID 334656
Internal Note:

1 Student(s)
Regular Statement Type
0.00 Balance Outstanding

SUCCESS
Save was successful.

Jill
Upthehill
Age 11

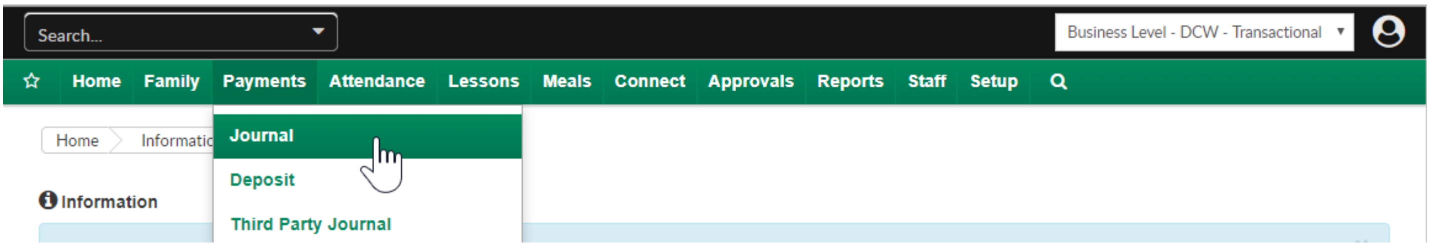
Jack
Upthehill
Age 5

Quick Links- Submit Payments

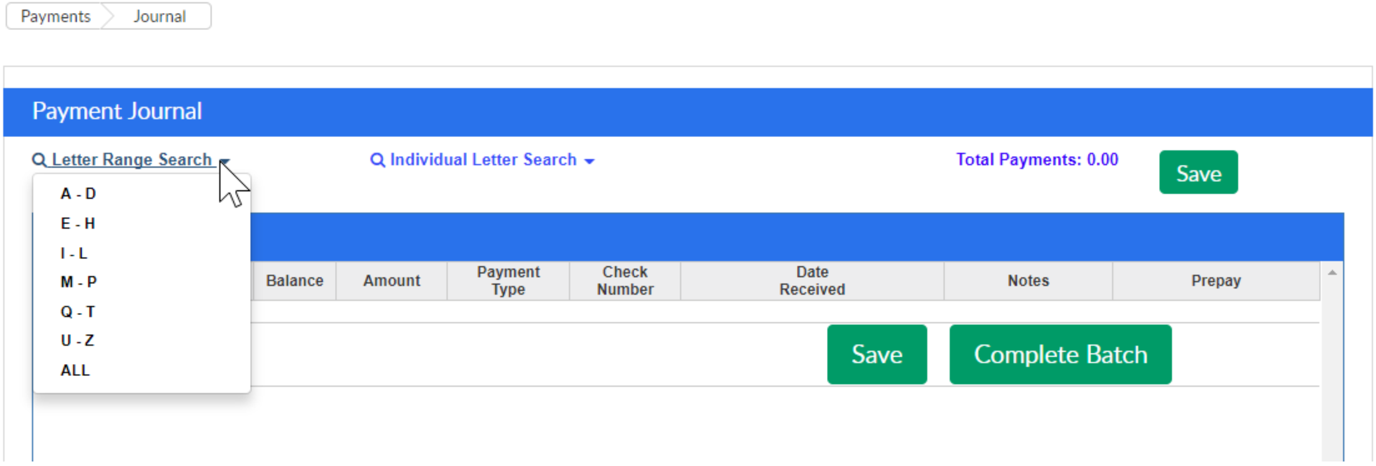
Last Modified on 05/30/2018 2:28 pm EDT

The Payments > Journal-page allows users to receipt payments by family in batch format. Do not receipt online payments through this method that need to be processed through a payment gateway, the only payments that should be receipted here are typically- cash, check, money order or another type of off-line payment.

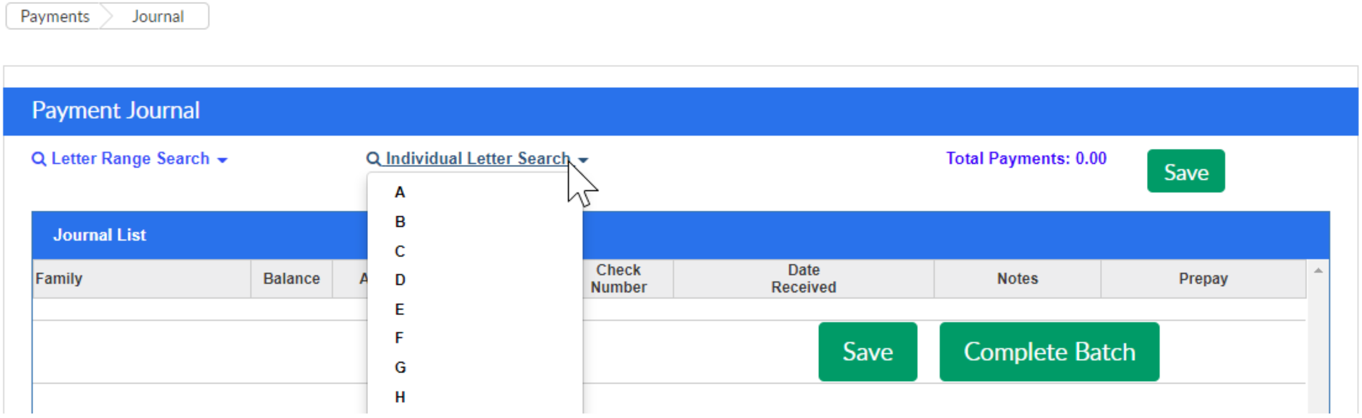
From the payments drop down menu select the Journal option.



To start, select either the letter range or the individual letter of the family's last name for the payment you want to receipt.   Press All if you want to see all families.

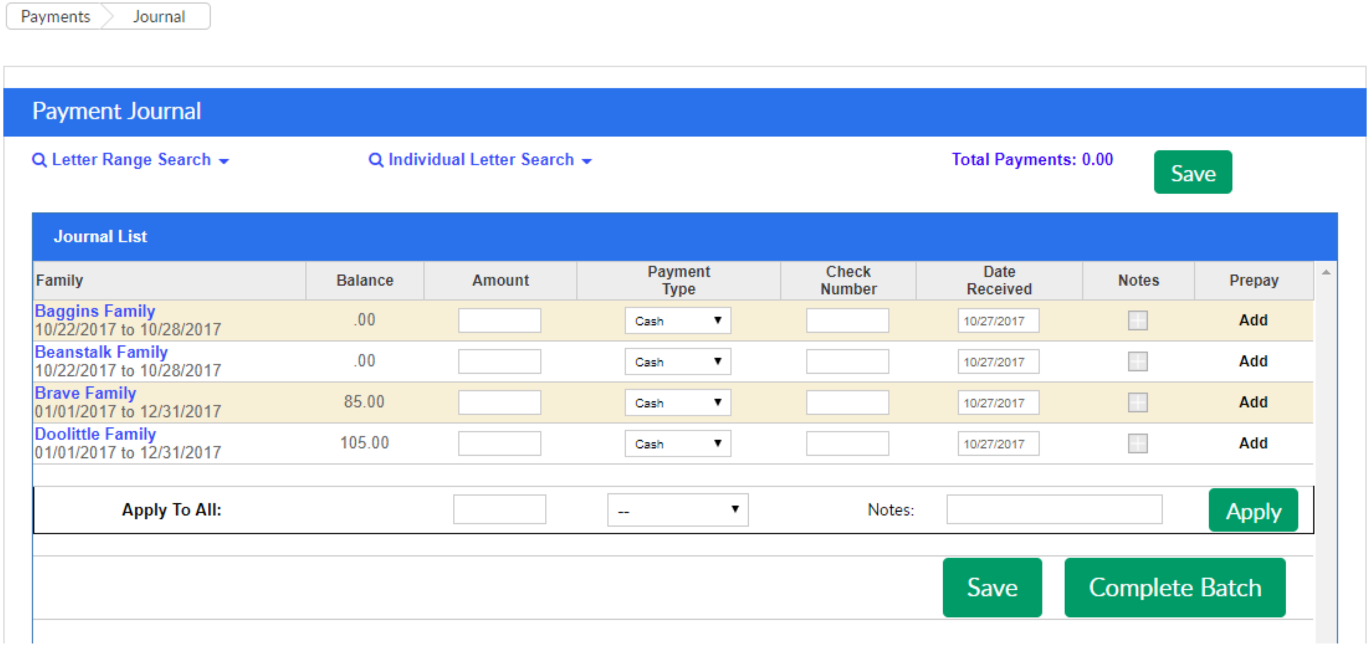


or



This will bring up families that have the last name that matches the search criteria. In the journal list the below fields display-

- Family- last name of the family and date of the family's last balance due
- Balance- amount the family owes
- Amount- amount of the payment (this will be entered by the user creating the receipts)
- Payment Type- the type of payment being receipted (the options in the drop-down list are populated by going to setup > system config, Valid Values)
- Check Number- enter the check number only if the payment type is a check
- Date Received- date the payment was received
- Notes- if any notes should be added to the payment
- Prepay- if the payment should be added as a prepay deposit to the family's ledger

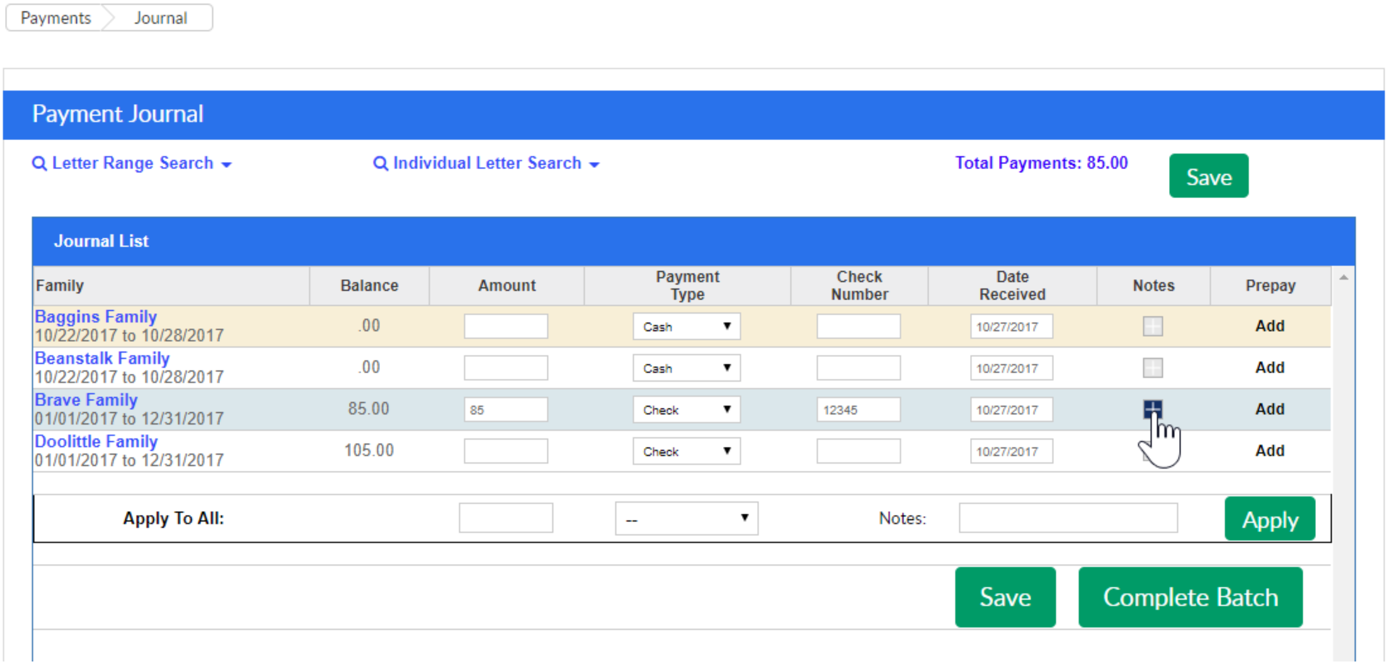


Total Payments: 0.00

Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	85.00		Cash		10/27/2017	☐	Add
Doolittle Family 01/01/2017 to 12/31/2017	105.00		Cash		10/27/2017	☐	Add

Apply To All: -- Notes:

To add a note to a payment click the plus button.


Payments > Journal

Payment Journal

Letter Range Search ▾ | Individual Letter Search ▾ | Total Payments: 85.00 | Save

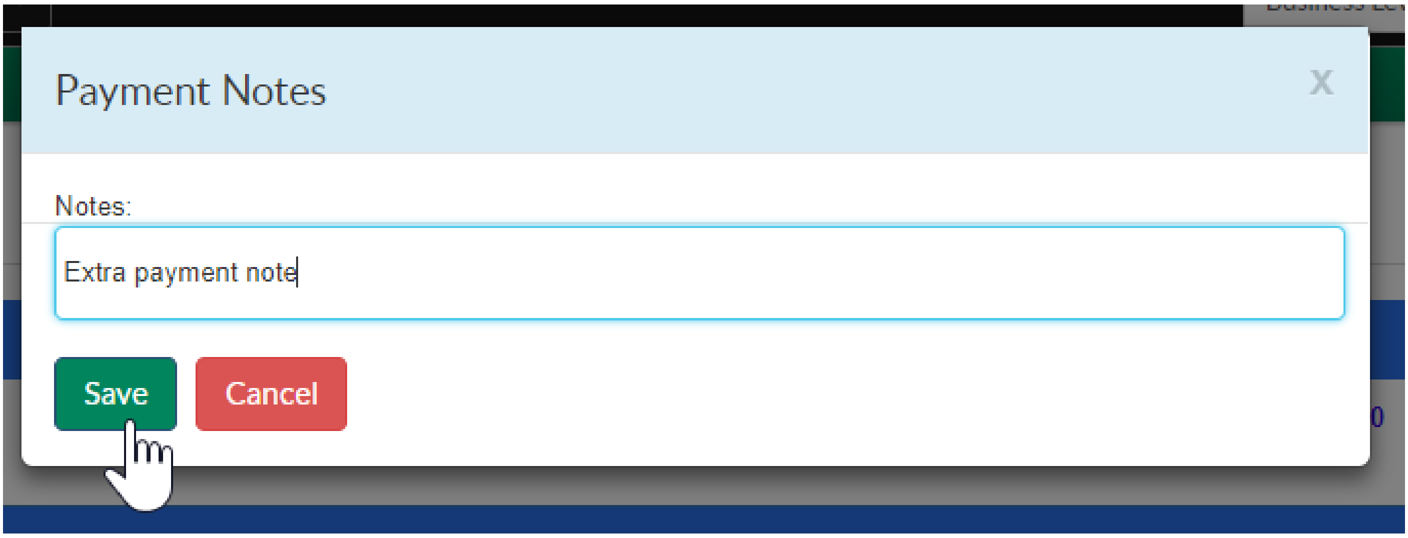
Journal List

Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	85.00	85	Check	12345	10/27/2017	☐	Add
Doolittle Family 01/01/2017 to 12/31/2017	105.00		Check		10/27/2017		Add

Apply To All: -- Notes: Apply

Save | Complete Batch

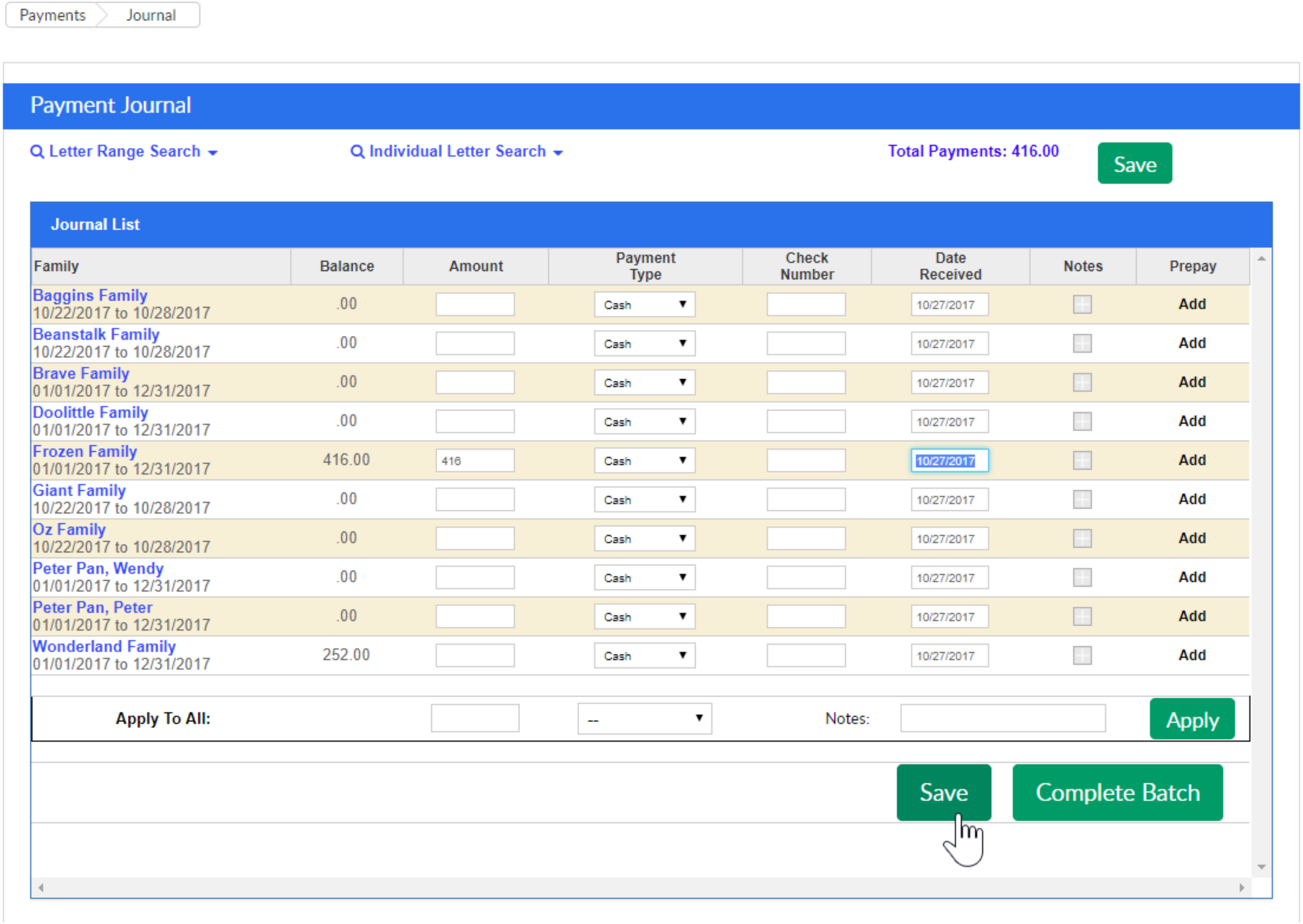
Enter the text of your payment note, then press save.


Payment Notes

Notes:

Extra payment note

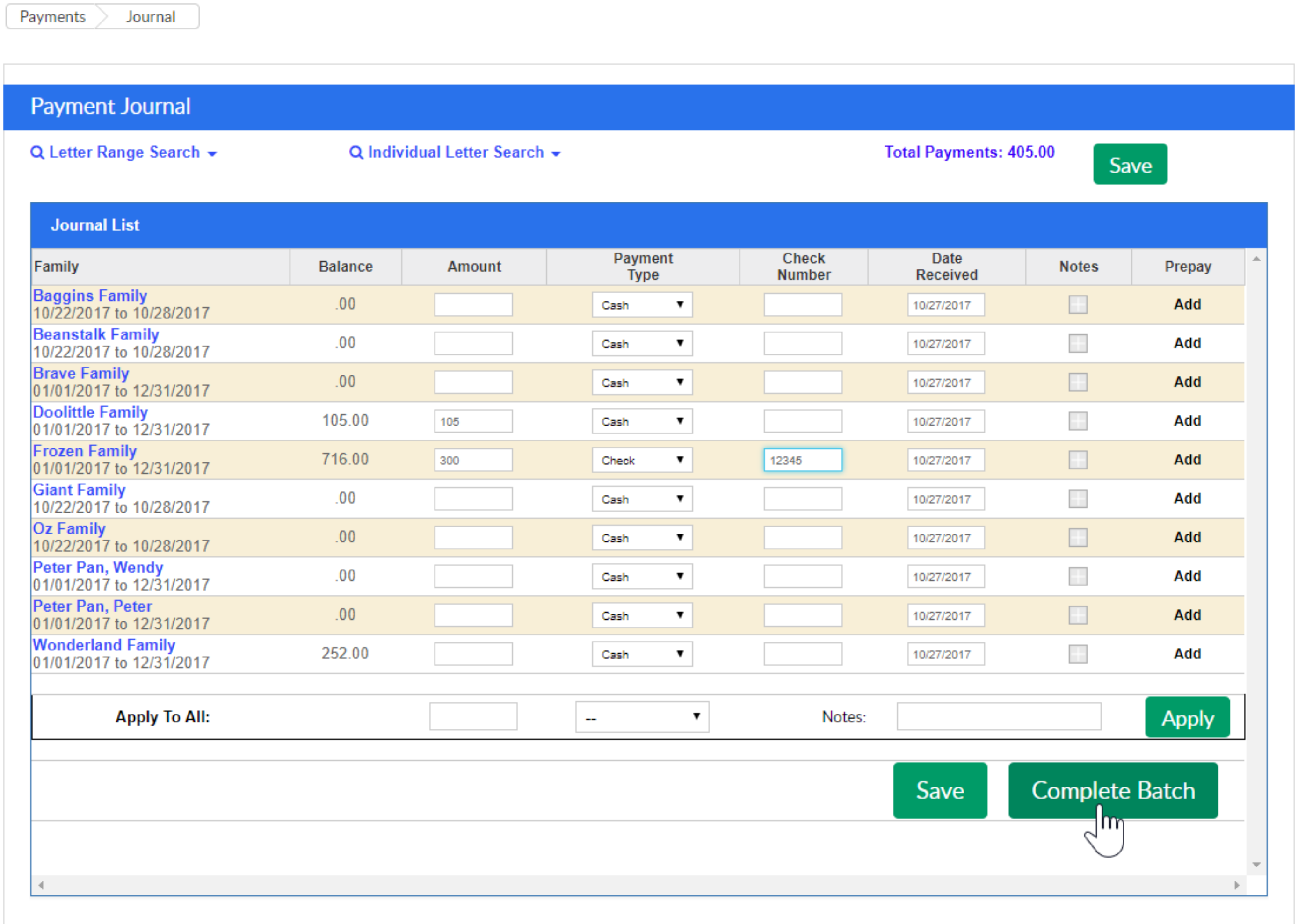
If a user navigates away from a letter grouping before pressing save or completing the batch the entered payment will not save. If you press save, the payment will post. The total of the payments being receipted will always display at the top of the page next to the save button.



Total Payments: 416.00

Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Doolittle Family 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Frozen Family 01/01/2017 to 12/31/2017	416.00	416	Cash		10/27/2017	☐	Add
Giant Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Oz Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Wendy 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Peter 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Wonderland Family 01/01/2017 to 12/31/2017	252.00		Cash		10/27/2017	☐	Add

Apply To All: -- Notes: Apply



Payments > Journal

Payment Journal

Letter Range Search ▾ | Individual Letter Search ▾ | **Total Payments: 405.00** | Save

Journal List

Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Doolittle Family 01/01/2017 to 12/31/2017	105.00	105	Cash		10/27/2017	☐	Add
Frozen Family 01/01/2017 to 12/31/2017	716.00	300	Check	12345	10/27/2017	☐	Add
Giant Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Oz Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Wendy 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Peter 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Wonderland Family 01/01/2017 to 12/31/2017	252.00		Cash		10/27/2017	☐	Add

Apply To All: | -- | Notes: | Apply

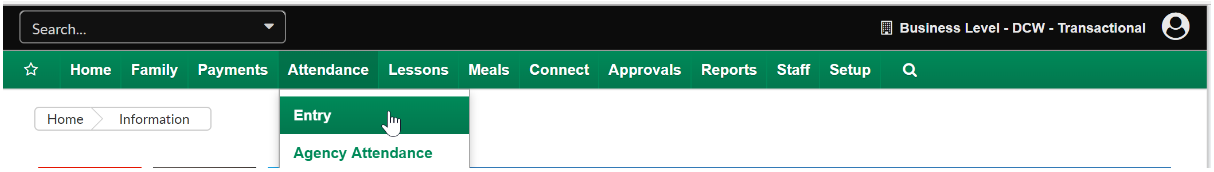
Save | Complete Batch

Once Complete Batch is selected, the screen will direct the user to the Batch and Report screen. On the Batch and Report screen, users can group payments together that are going to be or have been deposited to the bank in the same batch.

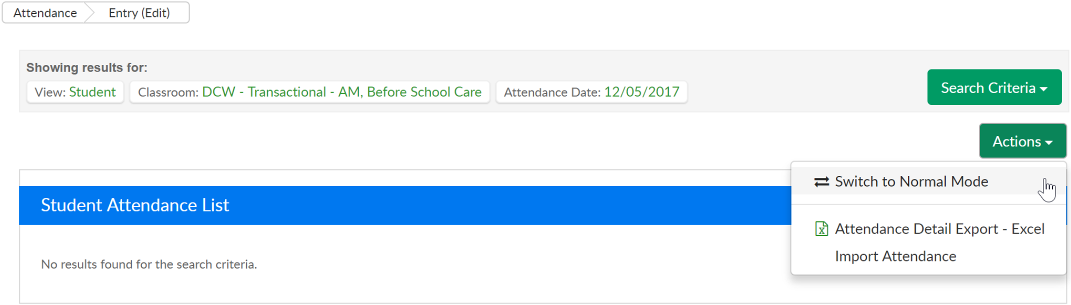
Quick Links- Take Attendance

Last Modified on 05/11/2018 1:33 pm EDT

The Attendance > Entry screen is where users will be able to check in children or staff from the web side, alter attendance records and review historical check-ins/outs by day.



The system offers different methods for administrators to record the attendance for the center. To switch between attendance modes select the action drop down menu- then select the "Switch To" option.



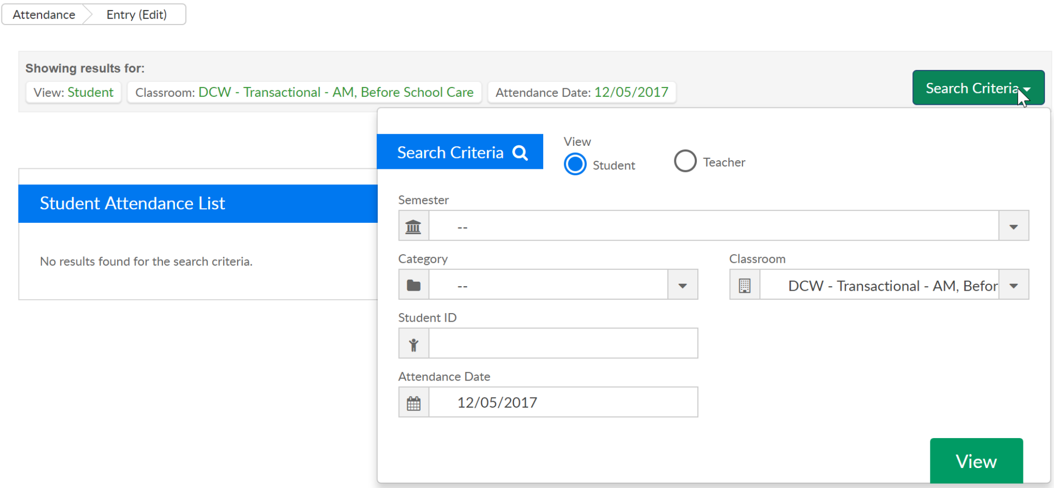
- The **Normal Mode** attendance section allows an administrator to check a child into a center or out of a center as the child enters or exits the center. It is similar to using the touchscreen application to check a child in or out of the center.
- The **Edit Mode** attendance section allows an administrator to enter the time a child entered or exited the center. This can be used to record when a child entered a center as it happens, or at the end of the day.

To take or view attendance select the Search Criteria button and enter the detail for the children that should display-

- Semester
- Category- select a category to pull a larger grouping of children (than just classroom)
- Classroom- select a specific room or select Show All to display all expected children
- Student ID- enter a student ID to pull just one student's attendance detail for the

selected day

- Attendance Date- the day's attendance that should be displayed



Showing results for:
View: Student | Classroom: DCW - Transactional - AM, Before School Care | Attendance Date: 12/05/2017

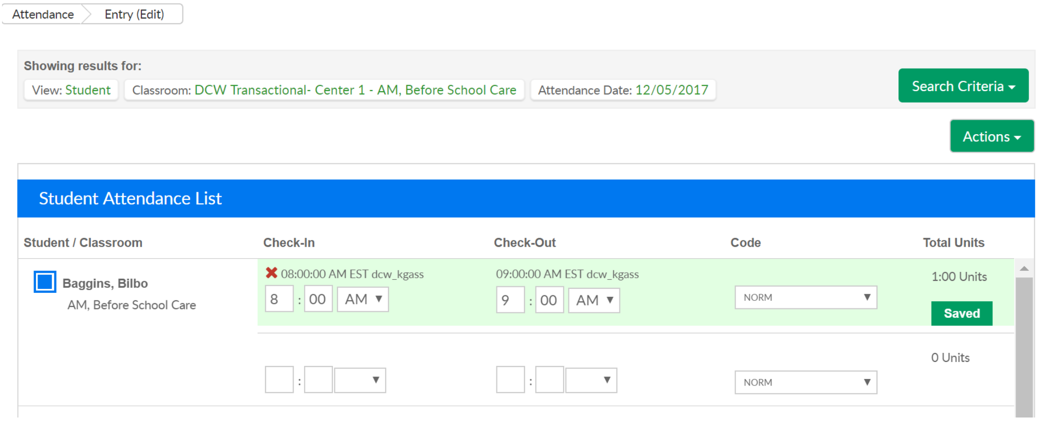
No results found for the search criteria.

View: ● Student ○ Teacher
Semester: --
Category: --
Classroom: DCW - Transactional - AM, Befor
Student ID:
Attendance Date: 12/05/2017

After selecting View, children will display.

In **edit mode** enter the check in or out time for each child, as times are entered tab over- the record will save automatically. When a check-in/out is completed a new line will display below the record in case the child is checking in/out again within the same room/day.

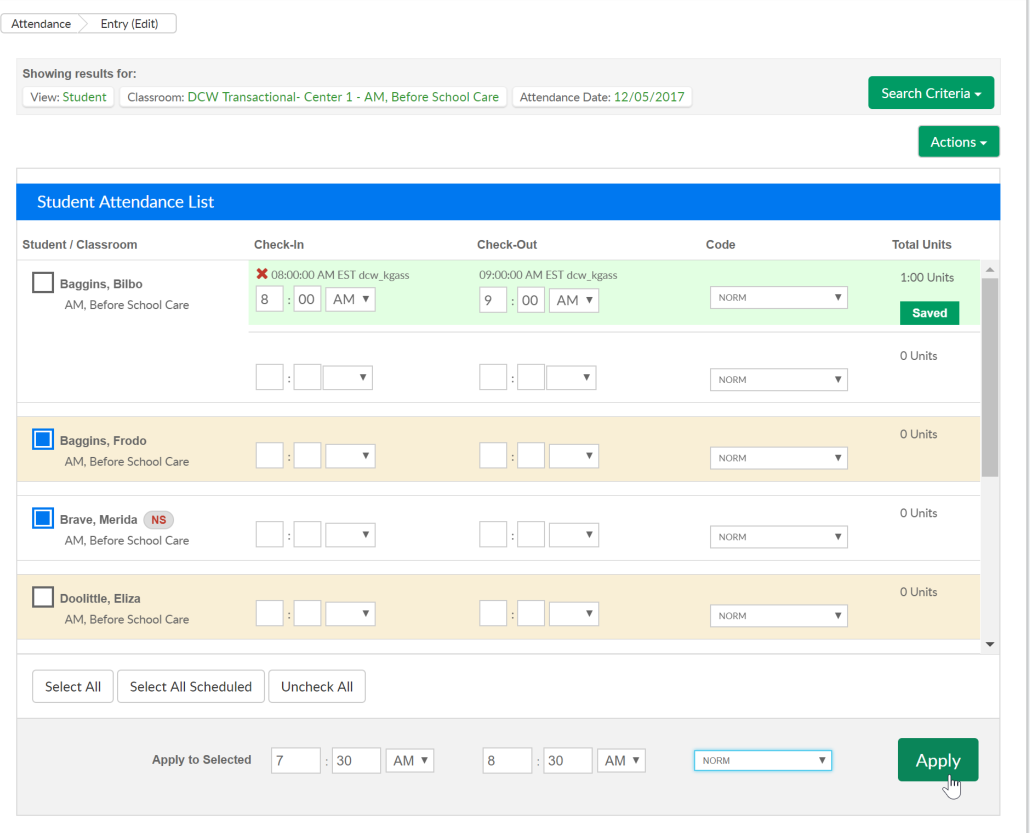
If an entry needs to be changed or deleted this is the view the user would be able to make changes in, select the red x to delete a check in/out or click into the time fields and update as needed. Each time a new piece of data is entered press tab to be sure the detail is saved.



Showing results for:
View: Student | Classroom: DCW Transactional- Center 1 - AM, Before School Care | Attendance Date: 12/05/2017

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ Baggins, Bilbo AM, Before School Care	✗ 08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units
	:	:	NORM	0 Units

To add detail for multiple children at once, select the square to the left of the child's name, then go to the apply all selected area and enter times.



Showing results for:

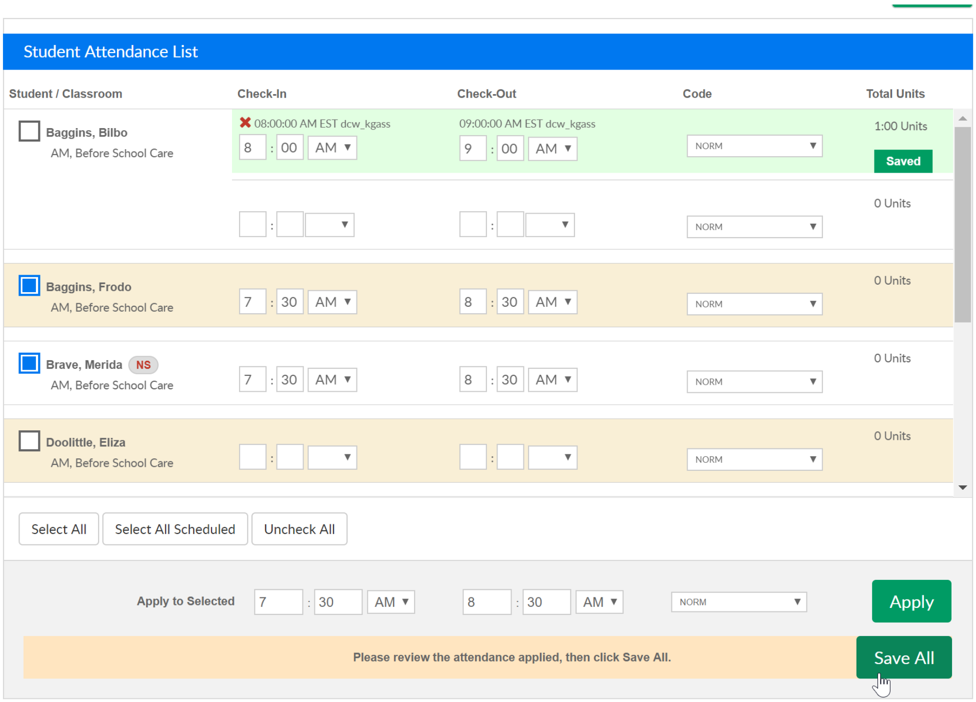
View: Student | Classroom: DCW Transactional- Center 1 - AM, Before School Care | Attendance Date: 12/05/2017

Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ **Baggins, Bilbo** AM, Before School Care	08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Baggins, Frodo** AM, Before School Care	:	:	NORM	0 Units
☑ **Brave, Merida** NS AM, Before School Care	:	:	NORM	0 Units
☐ **Doolittle, Eliza** AM, Before School Care	:	:	NORM	0 Units

Apply to Selected 7 : 30 AM | 8 : 30 AM | NORM

Once times are entered click apply to apply the times to the selected children, then click Save All.



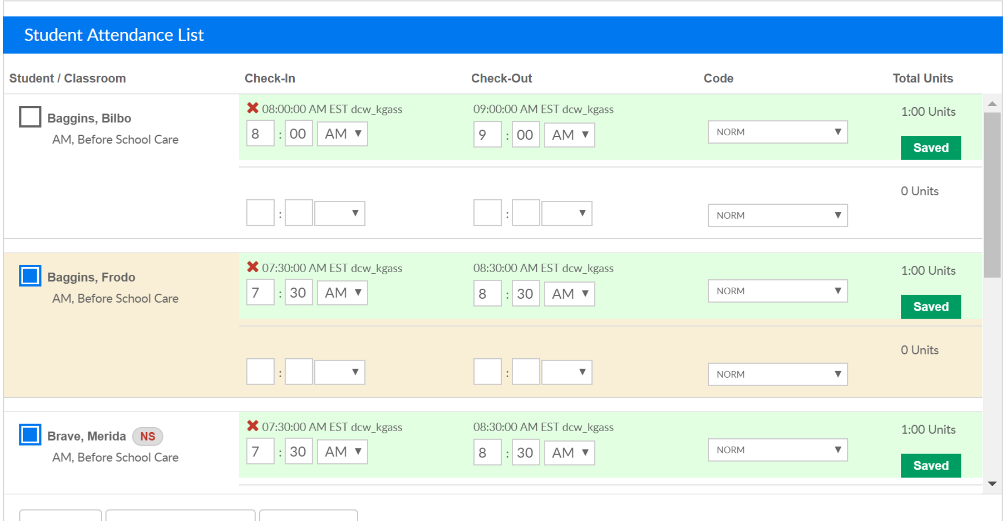
Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ **Baggins, Bilbo** AM, Before School Care	08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Baggins, Frodo** AM, Before School Care	7 : 30 AM	8 : 30 AM	NORM	0 Units
☑ **Brave, Merida** NS AM, Before School Care	7 : 30 AM	8 : 30 AM	NORM	0 Units
☐ **Doolittle, Eliza** AM, Before School Care	:	:	NORM	0 Units

Apply to Selected 7 : 30 AM | 8 : 30 AM | NORM

Please review the attendance applied, then click Save All.

Once the fields turn green, the records have been saved.



Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ **Baggins, Bilbo** AM, Before School Care	✖ 08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Baggins, Frodo** AM, Before School Care	✖ 07:30:00 AM EST dcw_kgass 7 : 30 AM	08:30:00 AM EST dcw_kgass 8 : 30 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Brave, Merida** NS AM, Before School Care	✖ 07:30:00 AM EST dcw_kgass 7 : 30 AM	08:30:00 AM EST dcw_kgass 8 : 30 AM	NORM	1:00 Units Saved

To see attendance over a period of time go to reports > room/program and pull one of the below reports- be sure you enter a date range and select the data you want to see by center, category or room!

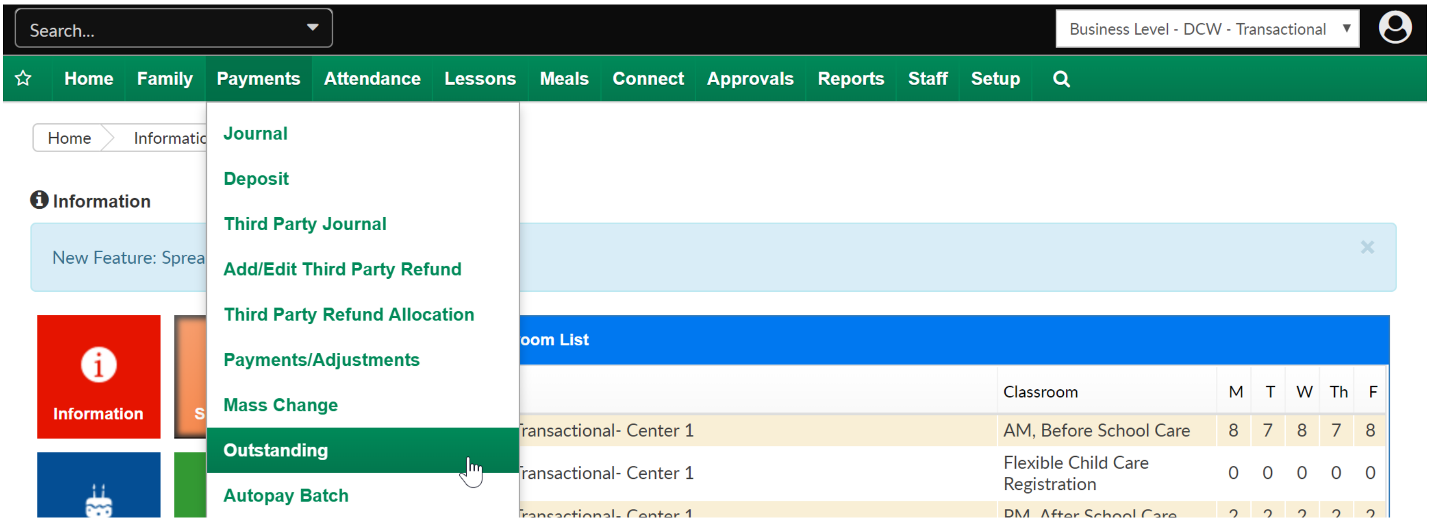
- Reports > Room/Program, Attendance- Child Attendance Detail - Excel
- Reports > Room/Program, Attendance- Site Summary Attendance - Excel

Quick Links- View Outstanding Payments

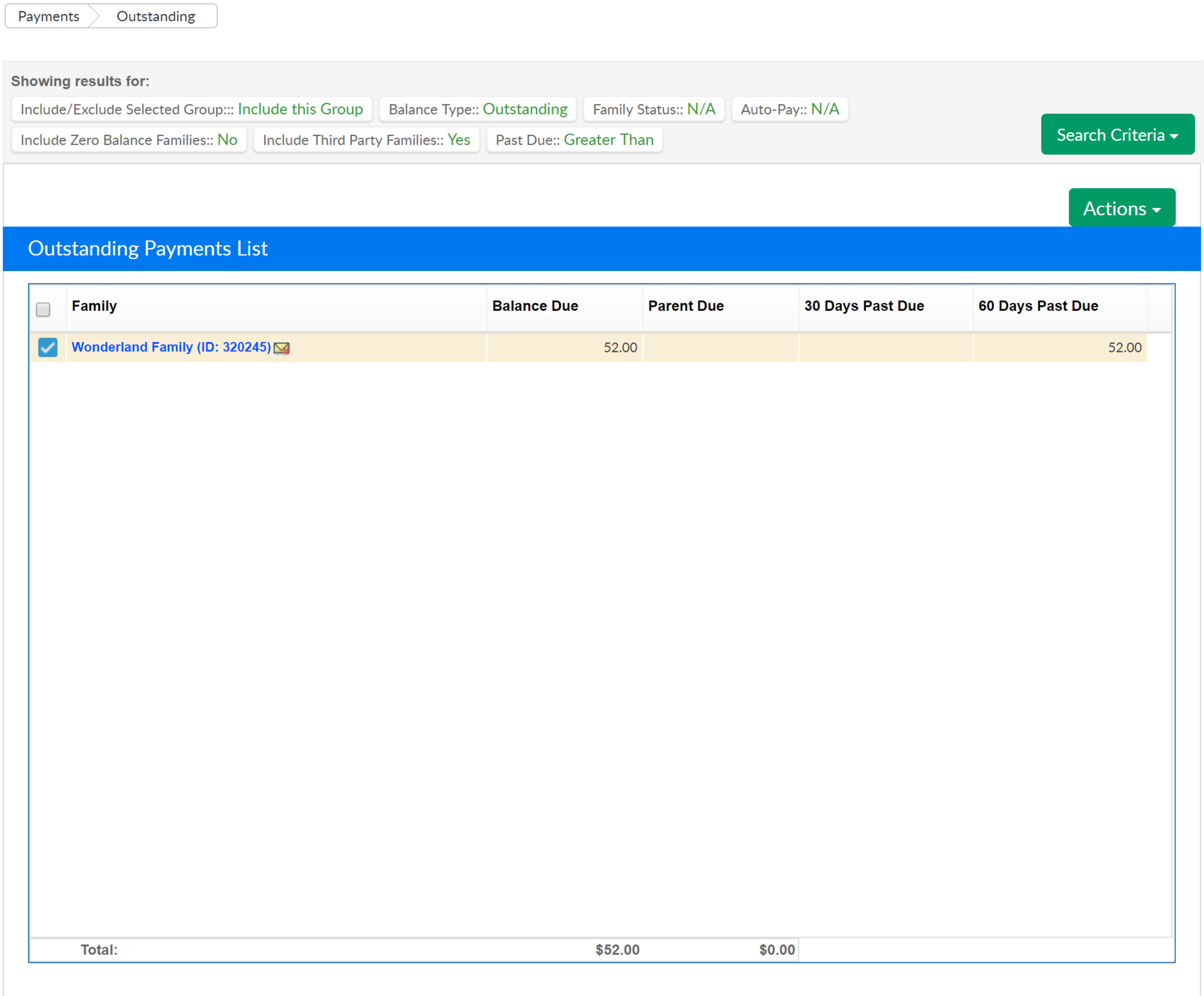
Last Modified on 05/11/2018 1:36 pm EDT

The Payments Outstanding screen will display amounts owed by families within the system.   Use search criteria to display related families. Statement and Reminder emails can be sent from this page, Outstanding balance reports can also be pulled.

From the Payment menu, select the Outstanding option-



As a default the first screen will display families that have outstanding balances.



Showing results for:

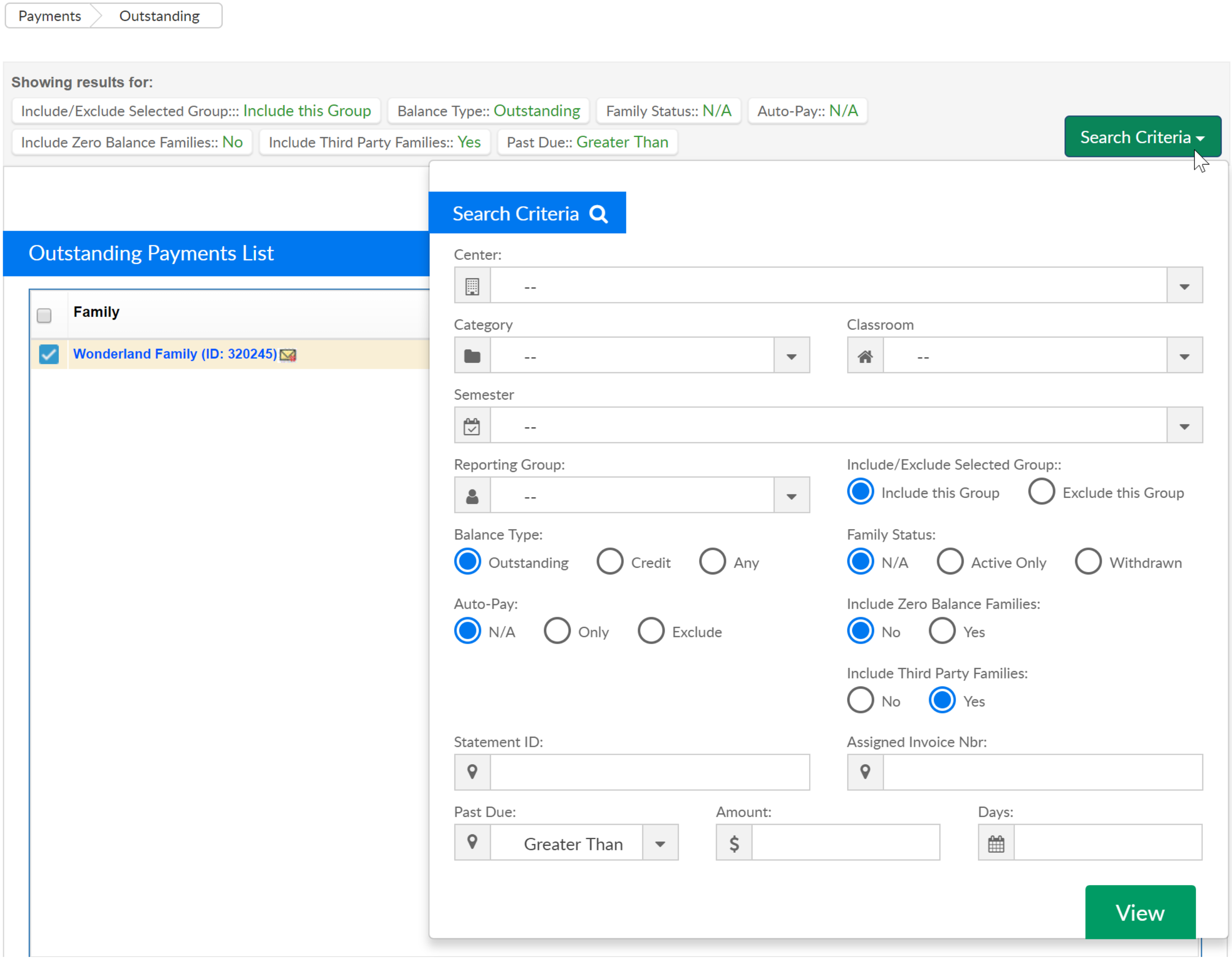
Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

☐	Family	Balance Due	Parent Due	30 Days Past Due	60 Days Past Due
☑	Wonderland Family (ID: 320245) ✉	52.00			52.00
	Total:	$52.00	$0.00		

To change from the default criteria, select the Search Criteria button.

- Center- select a center to see results for a particular center (at the business level)
- Category- select a category to see results for families who have children enrolled in programs within a category
- Classroom- select a classroom to see results for families who have children enrolled
- Semester- select a semester to see results for families enrolled in programs attached to a semester
- Reporting Group- select a reporting group, then select if the group should be included or excluded from results
    - Include/Exclude Selected Group
- Balance Type

    - Outstanding- displays family with balances due
    - Credit- displays families with credit totals
    - Any- displays families with either credit or debit balances
- Family Status
    - N/A- results will not filter by status
    - Active- displays only active families
    - Withdrawn- displays only withdrawn family balances
- Auto-Pay
    - N/A- results will not filter by auto-pay type
    - Only- displays only auto-pay families
    - Exclude- does not display families with auto-pay
- Include Zero Balance Families
    - No- results will not include families with a zero balance on their financial ledger
    - Yes- results will include families with a zero balance on their financial ledger
- Include Third Party Families
    - No- results will not include families who receive third party sponsorship
    - Yes- results will include families who receive third party sponsorship
- Statement ID- to search for a particular statement ID- found on a family's financial ledger
- Assigned Invoice No- to search for a particular invoice number- found on a family's financial ledger
- Past Due- select Greater Than, Less Than or Equal to either an amount or a number of days
    - Amount- enter an amount threshold to search on based on the past due selection above
    - Days- enter a number of days threshold to search on based on the past due selection above


Payments > Outstanding

Showing results for:
Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

Outstanding Payments List

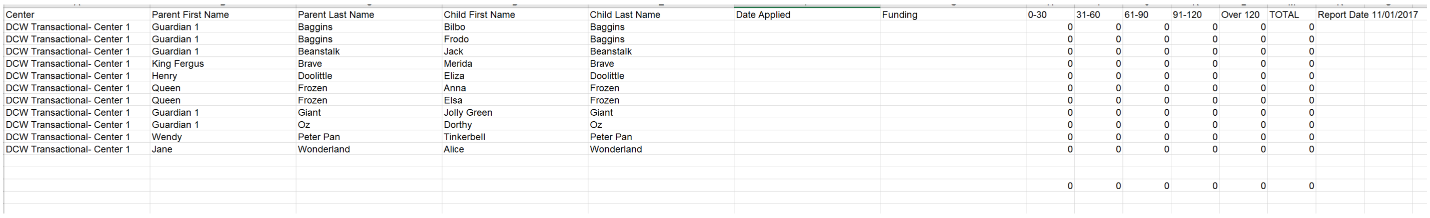
☐	Family
☑	Wonderland Family (ID: 320245)

Search Criteria

Center: --
Category: --
Classroom: --
Semester: --
Reporting Group: --
Include/Exclude Selected Group:: ● Include this Group ○ Exclude this Group
Balance Type: ● Outstanding ○ Credit ○ Any
Family Status: ● N/A ○ Active Only ○ Withdrawn
Auto-Pay: ● N/A ○ Only ○ Exclude
Include Zero Balance Families: ● No ○ Yes
Include Third Party Families: ○ No ● Yes
Statement ID:
Assigned Invoice Nbr:
Past Due: Greater Than
Amount: $
Days:

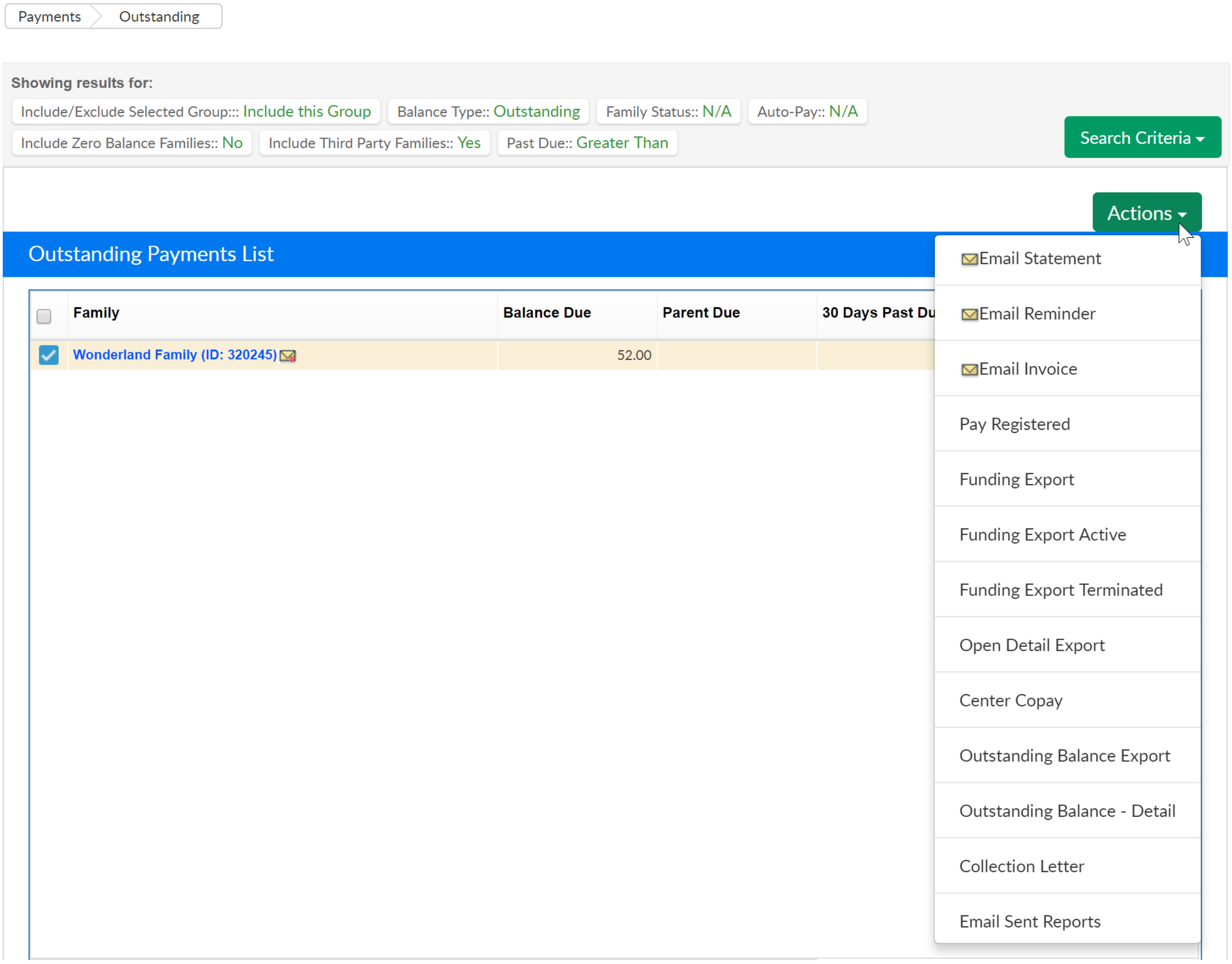
Once families are displaying, select the Actions menu to send statement or reminder emails, pull balance reports, and more-

- Email Statement- emails the families their current balance
- Email Reminder- emails a reminder that includes the billing invoice to the families
- Email Invoice-sends an invoice to the families, user is able to select a specific date range to include on the statement
- Pay Registered- submits a payment to all of the families with an auto-pay setup, click on the Pay Registered link. Families with auto-pay setup will have an arrow circle icon to the left of their names
- Funding Export- a report that will display if a family is sponsored, and the type of funding they have had applied to their balance (third party payments)



Center	Parent First Name	Parent Last Name	Child First Name	Child Last Name	Date Applied	Funding	0-30	31-60	61-90	91-120	Over 120	TOTAL	Report Date 11/01/2017
DCW Transactional- Center 1	Guardian 1	Baggins	Bilbo	Baggins			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Baggins	Frodo	Baggins			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Beanstalk	Jack	Beanstalk			0	0	0	0	0	0	
DCW Transactional- Center 1	King Fergus	Brave	Merida	Brave			0	0	0	0	0	0	
DCW Transactional- Center 1	Henry	Doolittle	Eliza	Doolittle			0	0	0	0	0	0	
DCW Transactional- Center 1	Queen	Frozen	Anna	Frozen			0	0	0	0	0	0	
DCW Transactional- Center 1	Queen	Frozen	Elsa	Frozen			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Giant	Jolly Green	Giant			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Oz	Dorthy	Oz			0	0	0	0	0	0	
DCW Transactional- Center 1	Wendy	Peter Pan	Tinkerbell	Peter Pan			0	0	0	0	0	0	
DCW Transactional- Center 1	Jane	Wonderland	Alice	Wonderland			0	0	0	0	0	0	
							0	0	0	0	0	0	

- Funding Export Active
- Funding Export Terminated
- Open Detail Export
- Center Copay
- Outstanding Balance Export
- Outstanding Balance- Detail
- Collection Letter
- Email Sent Report



Showing results for:

Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

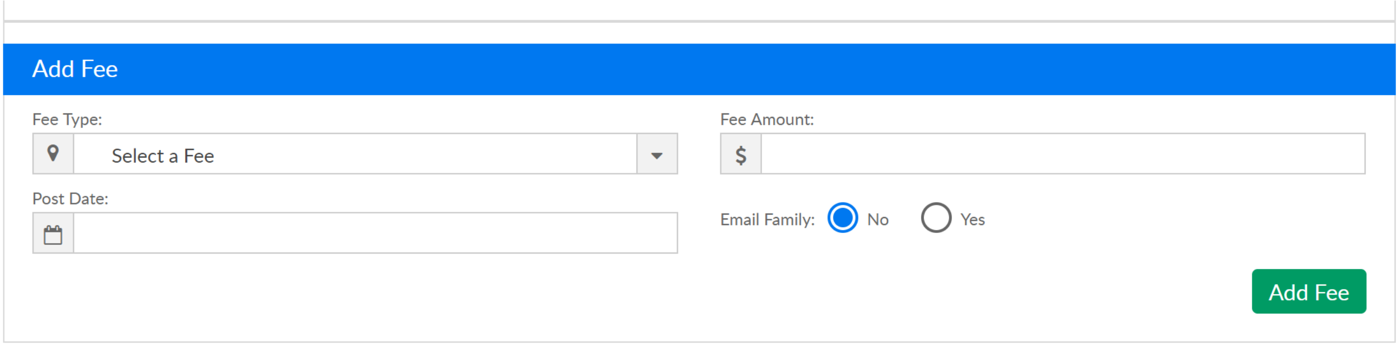
Outstanding Payments List

☐	Family	Balance Due	Parent Due	30 Days Past Du
☑	Wonderland Family (ID: 320245)	52.00		

Late Fees can also be added from this page, scroll to the very bottom of the page to the Add Fees section.

- Fee Type- Select the type of fee that should be charged. From this page, you should only add Late Payment or Pickup fees
- Fee Amount- Enter the amount that should be charged per family
- Post Date- Enter the date that should display on family statements
- Email Family- Select No if you do not want to email families, select Yes to email families that a charge has been added to their statement

Once detail has been entered, press Add Fee. Any family that was selected above will have a fee added to their financial ledger.

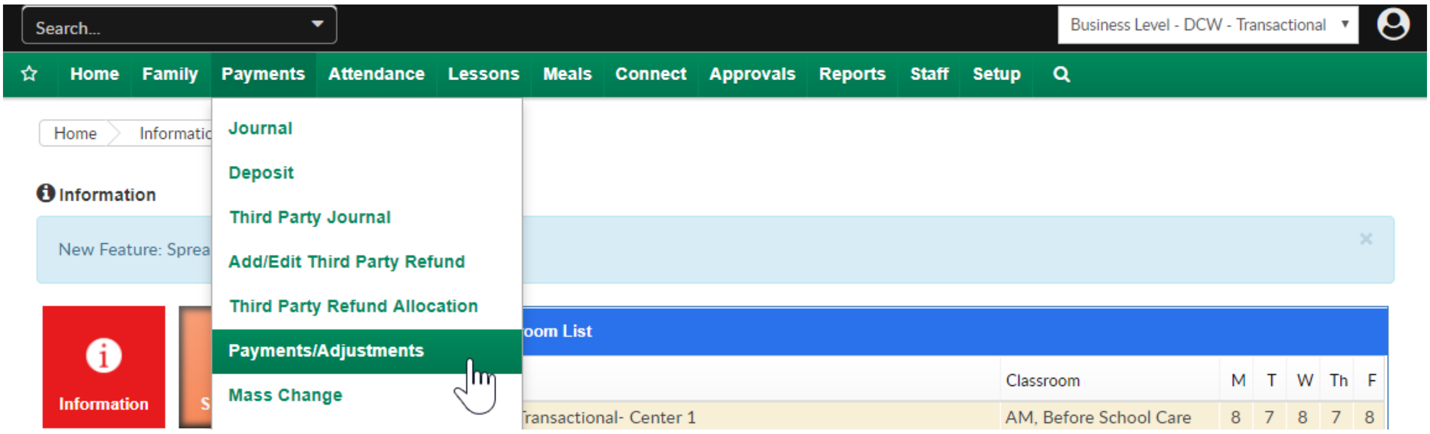


Quick Links- View Payment Report

Last Modified on 05/11/2018 1:39 pm EDT

The Payments > Payments screen allows users to search and display payments received in a particular period.

From the Payments menu, select Payments/Adjustments-

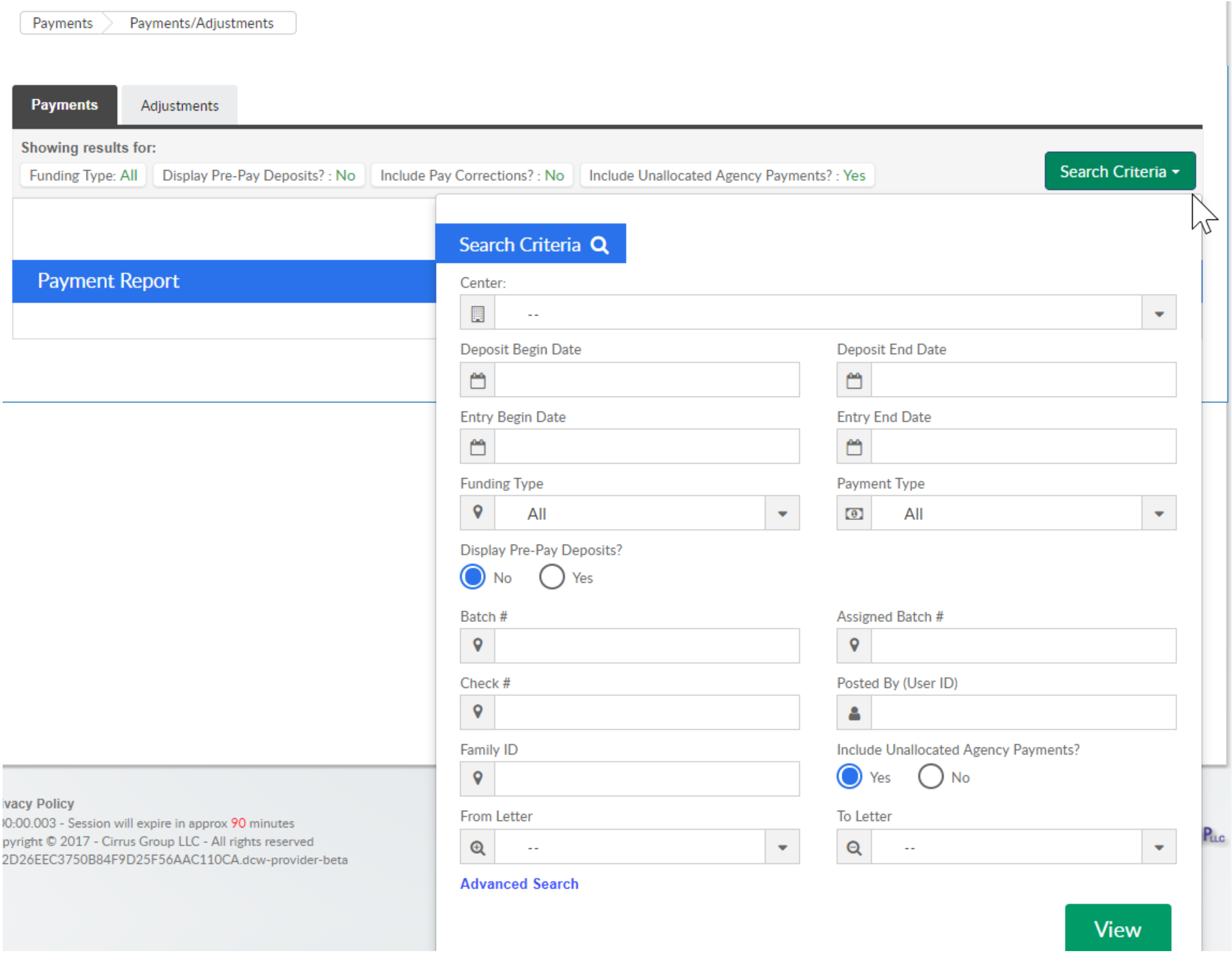


Select the Search Criteria button to begin searching. As much or as little detail can be added as desired, but always enter an entry begin date and an entry end date to see results.

- Center- view by center payments that have been receipted
- Deposit Begin Date
- Deposit End Date
- Entry Begin Date-*required*
- Entry End Date-*required*
- Funding Type
    - Copay/Parent Only
    - All- including third party/sponsor payments
    - Third Party/Sponsor Only
- Payment Type- if the user would only like to see one type of payment in the results
- Display Pre-Pay Deposits
    - Yes- pre-pay deposits will display in results
    - No- prepay deposits will not display in results

- Batch #- enter specific batch number (assigned by Cirrus Group)
- Assigned Batch #- enter specific batch number (assigned by user on Batch & Report screen)
- Check #- to search by specific check number
- Posted By (User ID)- to see only payments posted by a specific user
- Family ID- to see only one family's payments
- Include Allocated Agency Payments- to display outstanding credits from third party/sponsors
- From Letter- to search a range of the alphabet
- To Letter- to search a range of the alphabet
- Advanced Search- will allow users to search by brand, district or division of the values have been setup

Once criteria has been added select View.

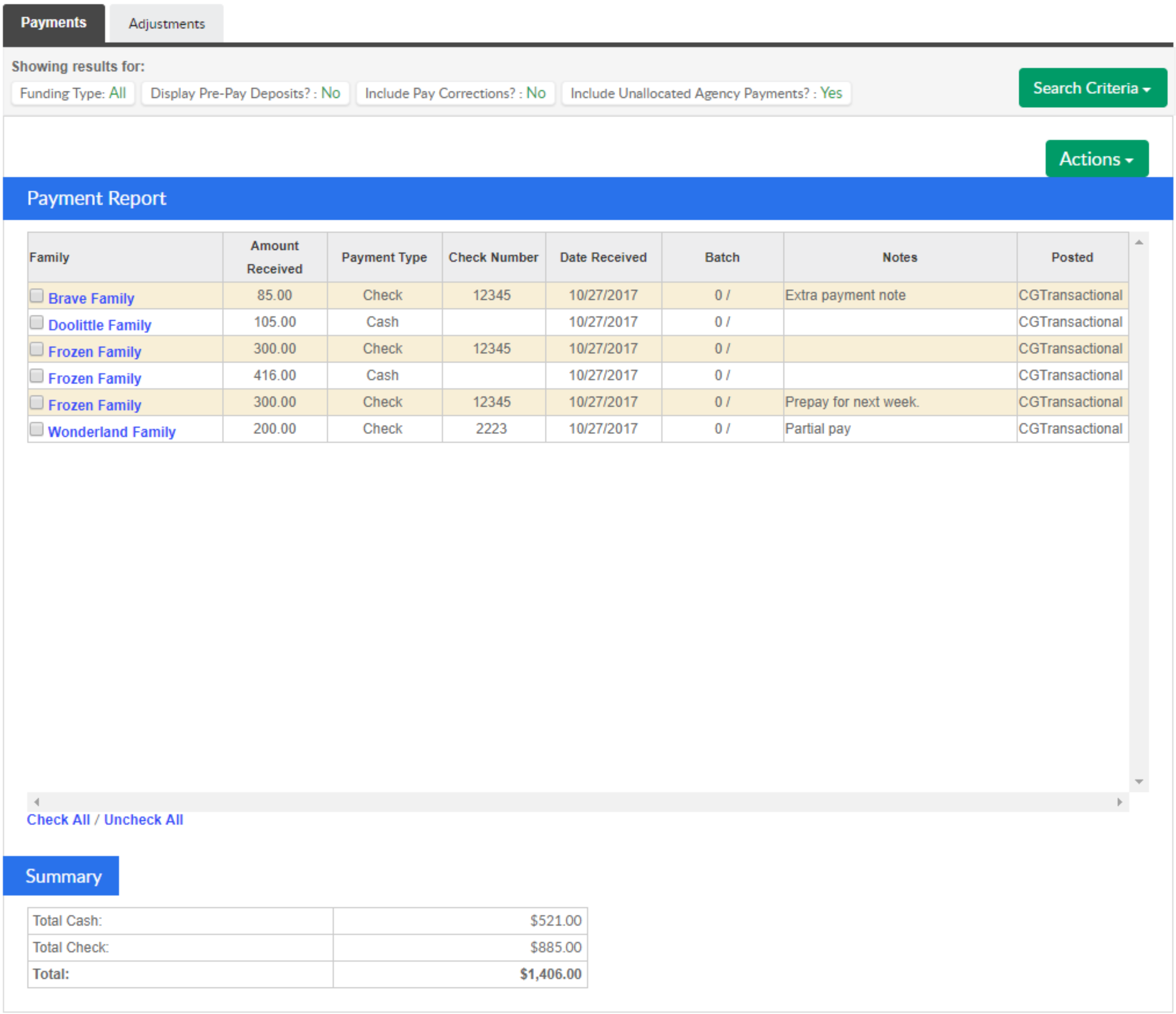


Showing results for:
Funding Type: All
Display Pre-Pay Deposits? : No
Include Pay Corrections? : No
Include Unallocated Agency Payments? : Yes

Center: --
Deposit Begin Date
Deposit End Date
Entry Begin Date
Entry End Date
Funding Type: All
Payment Type: All
Display Pre-Pay Deposits? ● No ○ Yes
Batch #
Assigned Batch #
Check #
Posted By (User ID)
Family ID
Include Unallocated Agency Payments? ● Yes ○ No
From Letter: --
To Letter: --

vacy Policy
0:00.003 - Session will expire in approx 90 minutes
pyright © 2017 - Cirrus Group LLC - All rights reserved
2D26EEC3750B84F9D25F56AAC110CA.dcw-provider-beta

Search results will display in the Payment Report box, with a summary of the payments in the Summary section.



Showing results for:
Funding Type: All | Display Pre-Pay Deposits? : No | Include Pay Corrections? : No | Include Unallocated Agency Payments? : Yes

Payment Report

Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
☐ Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
☐ Doolittle Family	105.00	Cash		10/27/2017	0 /		CGTransactional
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactional
☐ Frozen Family	416.00	Cash		10/27/2017	0 /		CGTransactional
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
☐ Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

Check All / Uncheck All

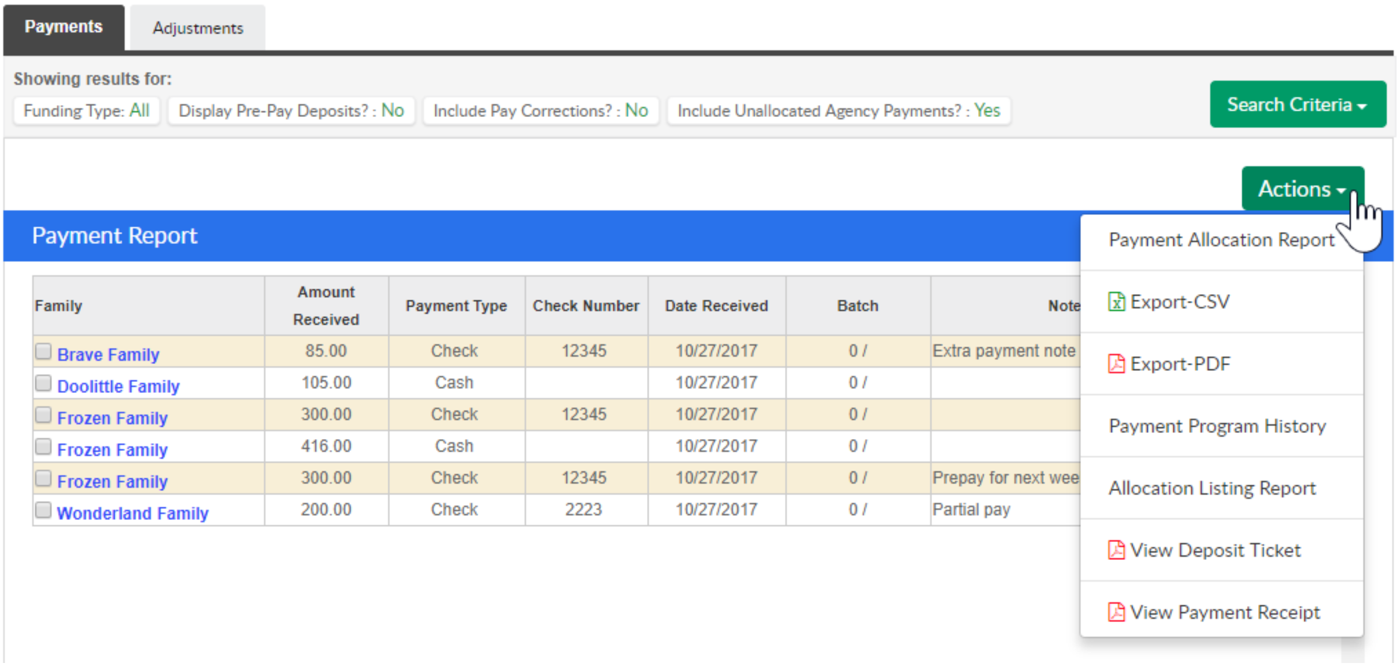
Summary

Total Cash:	$521.00
Total Check:	$885.00
Total:	**$1,406.00**

To pull a report listing the payments press the Actions menu.

- Payment Allocations Report- Allows users to see payments that have not been fully allocated
- Export- CSV- creates an excel report for the payments that are displaying on the screen
- Export- PDF- creates a PDF report for the payments that are displaying on the screen

- Payment Program History- A list of the transactions, both incoming and outgoing to a facility.
- Allocation Listing Report- Displays allocations for payments
- View Deposit Ticket- select the check boxes next to payments in the payment report list before selecting this option, then when you select View Deposit Ticket, payments will display on a deposit ticket in PDF format for each payment that was selected.
- View Payment Receipt- select the check boxes next to payments in the payment report list before selecting this option, then when you select View Payment Receipt, receipts will pull in PDF format for each payment that was selected.



Showing results for:
Funding Type: All
Display Pre-Pay Deposits? : No
Include Pay Corrections? : No
Include Unallocated Agency Payments? : Yes

Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Note
☐ Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note
☐ Doolittle Family	105.00	Cash		10/27/2017	0 /	
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /	
☐ Frozen Family	416.00	Cash		10/27/2017	0 /	
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next wee
☐ Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay

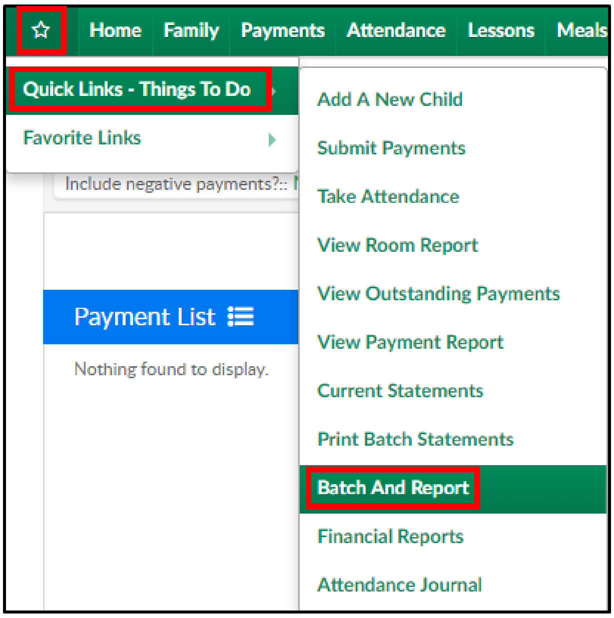
Quick Links - Batch and Report

Last Modified on 12/04/2018 9:33 am EST

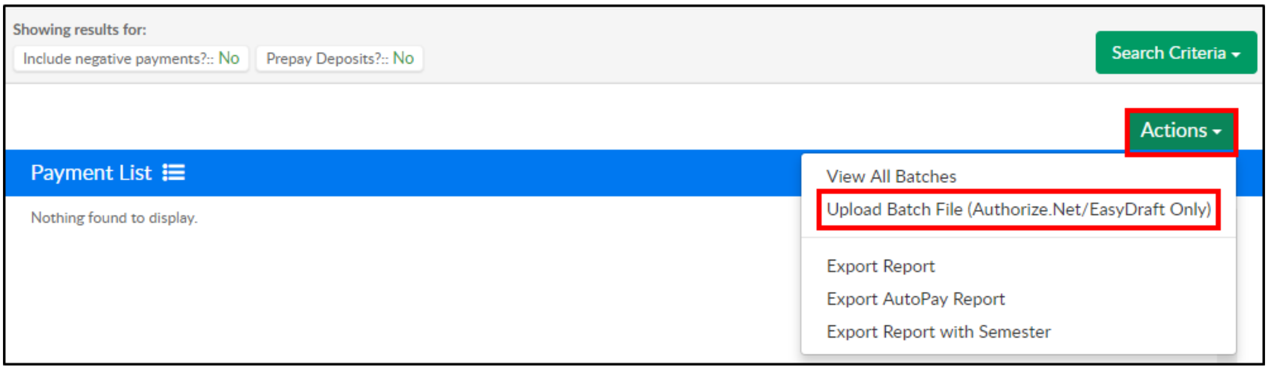
Batch and Report compiles the transaction information for the facility and displays the results.

To Upload Batch File from Unity

1. Pull the "Settlement Report" from Unity and save to the computer
    - **Please Note**: If you do not have access, speak with Rachel from Unity to request access
2. From the Star menu option, click Quick Links, then select Batch and Report

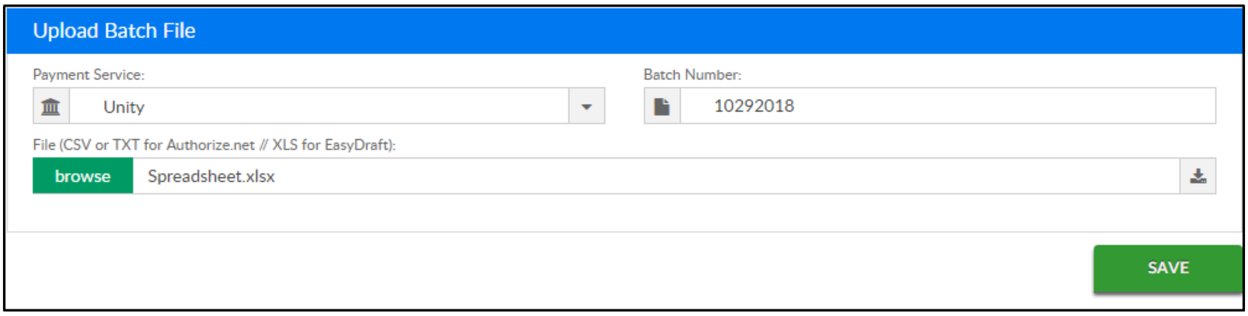


3. Click Actions, then select Upload Batch File



4. Complete the Upload Batch File section
    - Payment Service – select Unity or Card Connect depending on the payment processor used
    - Batch Number – enter a batch number. For example, use the date of the upload: 11132018

    - Click in the Browse field to select the file exported from Unity



Payment Service: Unity

Batch Number: 10292018

File (CSV or TXT for Authorize.net // XLS for EasyDraft): Spreadsheet.xlsx

5. Click Save

Pulling Reports

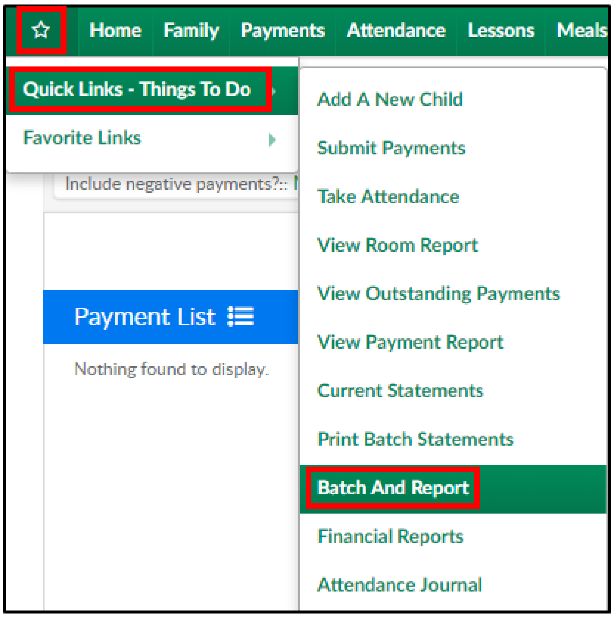
Pull multiple reports depending on the information needed:

- Under the Report > Financial screen, pull the following:
    - Settlement/Allocation by Room Report
    - Settlement/Allocation by Semester
    - Settlement/Allocation Report
- Under the Batch and Report screen, click Actions and pull the Export Report with Semester report

Batch & Report Cash/Check/Money Order Process

To assign a batch number to cash, check, or money order, follow the steps below:

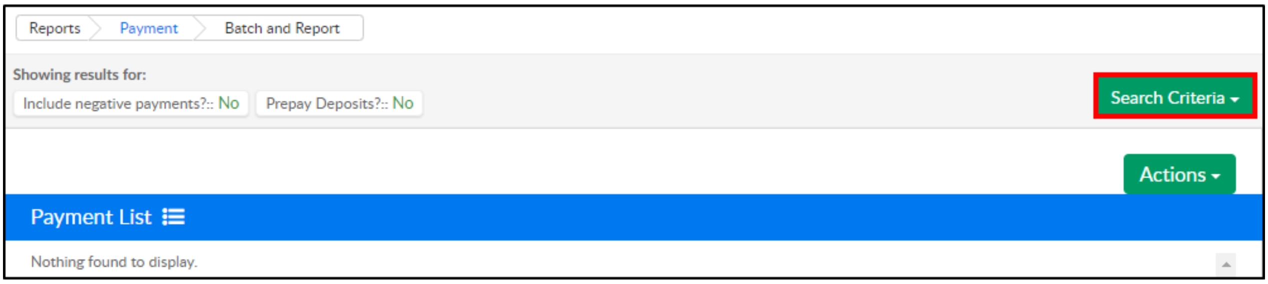
1. From the Star menu option, click Quick Links, then select Batch and Report



Include negative payments?:: N

Nothing found to display.

2. Click Search Criteria



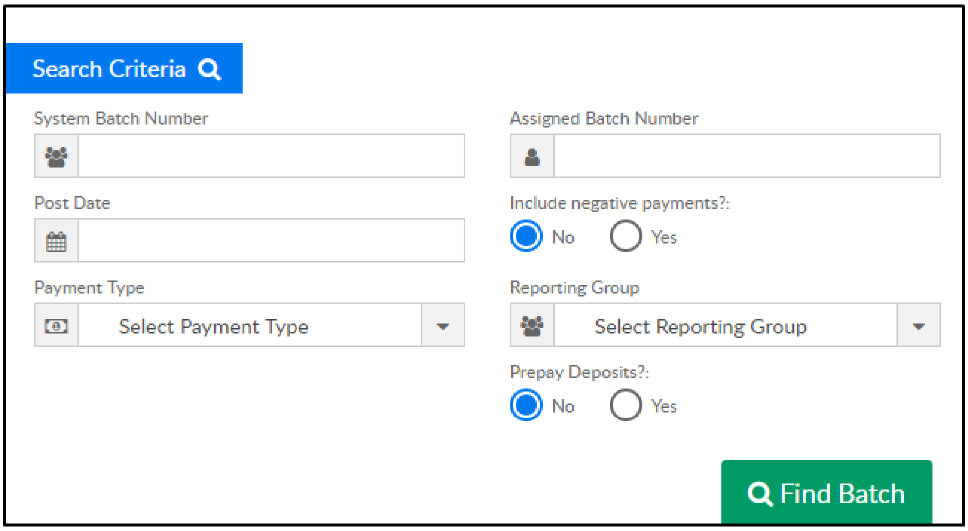
Showing results for:

Include negative payments?:: No

Prepay Deposits?:: No

Nothing found to display.

3. Enter any necessary search criteria

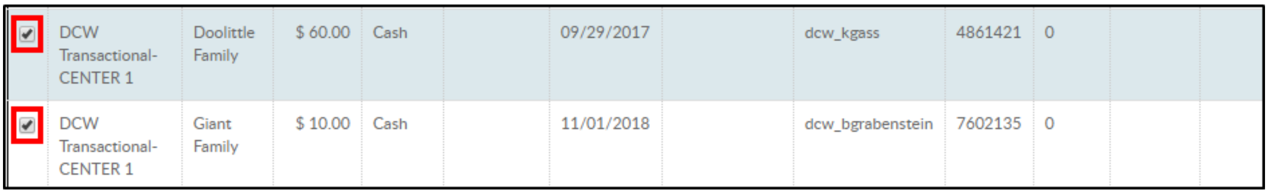


Include negative payments?: ● No ○ Yes

Prepay Deposits?: ● No ○ Yes

- System Batch Number – the system automatically generates zero as the batch number. Enter 0 for all payments that have not been batched yet
- Assigned Batch Number – if a batch number was previously assigned, enter that number here
- Post Date – enter a date to pull payments from a specific period. For all payments, leave this field blank
- Include Negative Payments

        - Yes – display payments and corrections
        - No – display only payments
4. Payment Type – select the payment type to view or leave blank to view all types
5. Reporting Group – to view payments from a specific reporting group, select from the dropdown
6. Prepay Deposits
    - Yes – view prepaid deposits
    - No – do not include prepaid deposits
7. Click Find Batch
8. Place a check mark next to each line to assign a batch number to



☑	DCW Transactional-CENTER 1	Doolittle Family	$ 60.00	Cash		09/29/2017		dcw_kgass	4861421	0		
☑	DCW Transactional-CENTER 1	Giant Family	$ 10.00	Cash		11/01/2018		dcw_bgrabenstein	7602135	0		

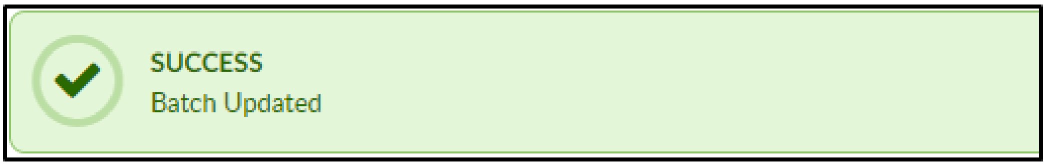
9. Scroll down to the Assign Batch section
10. Enter a new batch number in the New Assigned Batch Number field

Assign Batch

New Assigned Batch Number

11132018

11. Click Update Batch to complete the batch number assignment
12. The following message will appear at the top to confirm the batch has been updated



SUCCESS

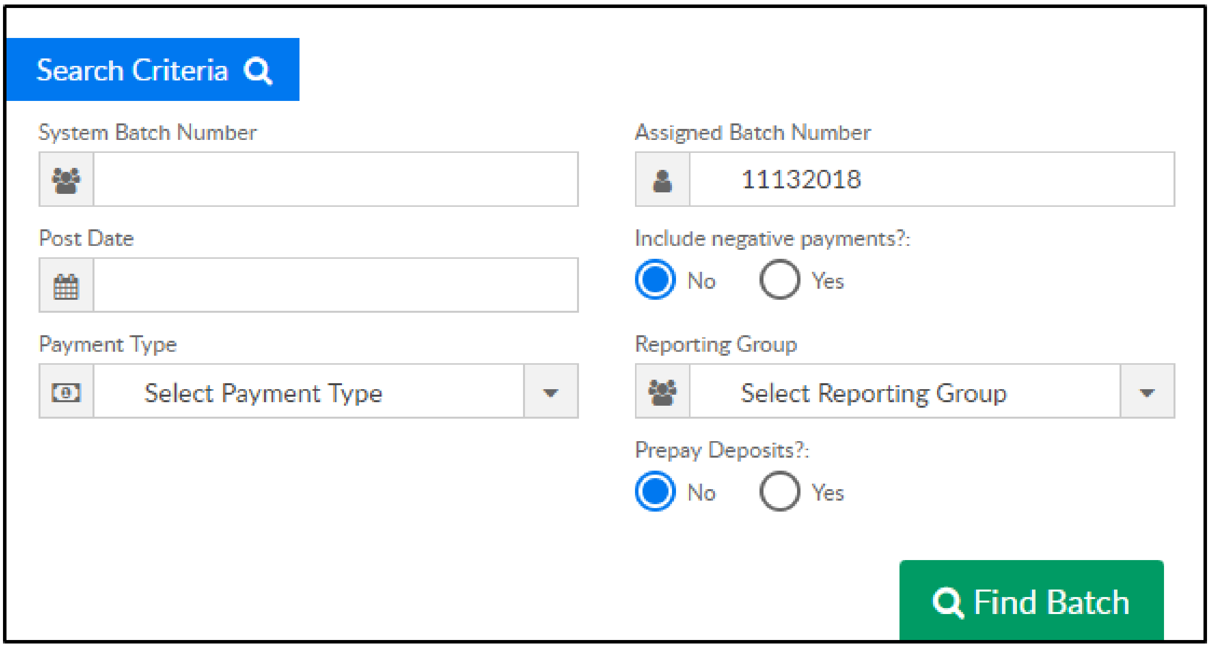
Batch Updated

13. Repeat steps 2-8 for additional payment types. Batch numbers can be assigned to multiple batches. For example, cash, check, and money order must be done separately, but can be assigned the same batch number

Find Batch with all Payment Types

1. Click Search Criteria
2. Enter search criteria

- Ensure System Batch Number is blank
- Enter the Assigned Batch Number
- Ensure Payment Type is set to Select Payment Type



System Batch Number:

Assigned Batch Number: 11132018

Post Date:

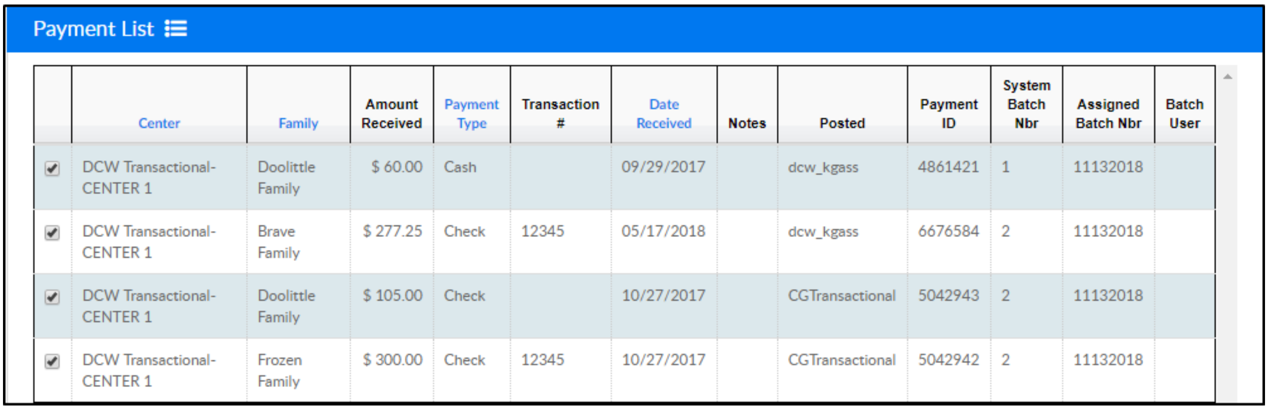
Include negative payments?: ● No ○ Yes

Payment Type: Select Payment Type

Reporting Group: Select Reporting Group

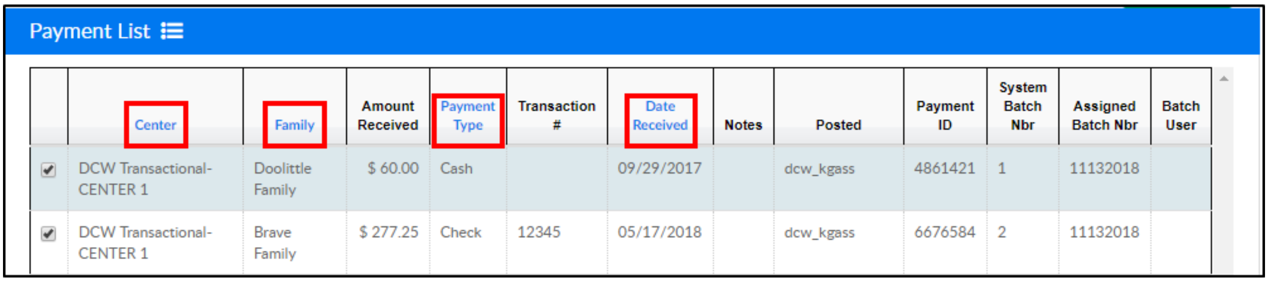
Prepay Deposits?: ● No ○ Yes

3. Click Find Batch
4. All payments/payment types assigned to the batch number will be listed below.



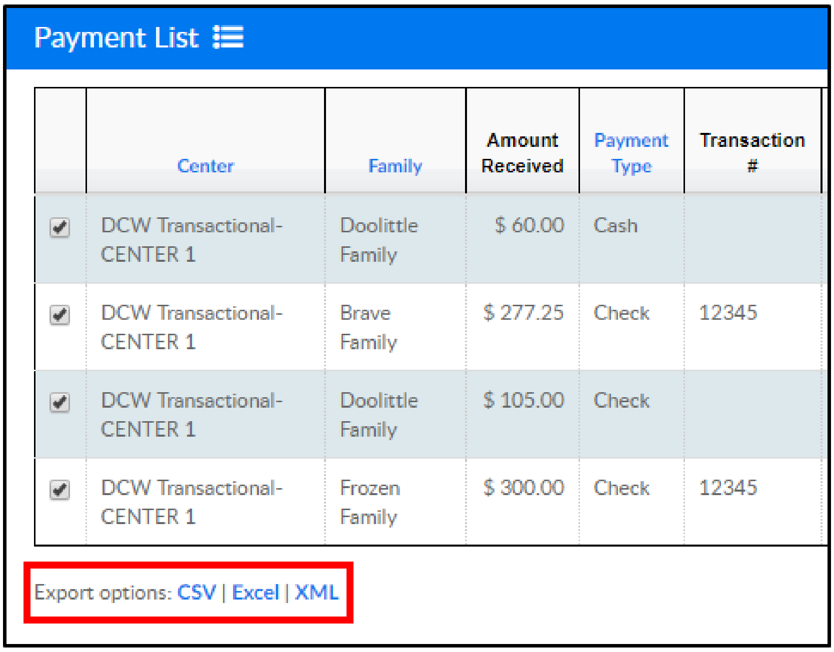
	Center	Family	Amount Received	Payment Type	Transaction #	Date Received	Notes	Posted	Payment ID	System Batch Nbr	Assigned Batch Nbr	Batch User
☑	DCW Transactional-CENTER 1	Doolittle Family	$ 60.00	Cash		09/29/2017		dcw_kgass	4861421	1	11132018	
☑	DCW Transactional-CENTER 1	Brave Family	$ 277.25	Check	12345	05/17/2018		dcw_kgass	6676584	2	11132018	
☑	DCW Transactional-CENTER 1	Doolittle Family	$ 105.00	Check		10/27/2017		CGTransactional	5042943	2	11132018	
☑	DCW Transactional-CENTER 1	Frozen Family	$ 300.00	Check	12345	10/27/2017		CGTransactional	5042942	2	11132018	

5. List can be reordered by Center, Family, Payment Type, or Date Received by clicking on the title



	Center	Family	Amount Received	Payment Type	Transaction #	Date Received	Notes	Posted	Payment ID	System Batch Nbr	Assigned Batch Nbr	Batch User
☑	DCW Transactional-CENTER 1	Doolittle Family	$ 60.00	Cash		09/29/2017		dcw_kgass	4861421	1	11132018	
☑	DCW Transactional-CENTER 1	Brave Family	$ 277.25	Check	12345	05/17/2018		dcw_kgass	6676584	2	11132018	

6. Payment List can also be exported to CSV, Excel, or XML formats



Payment List

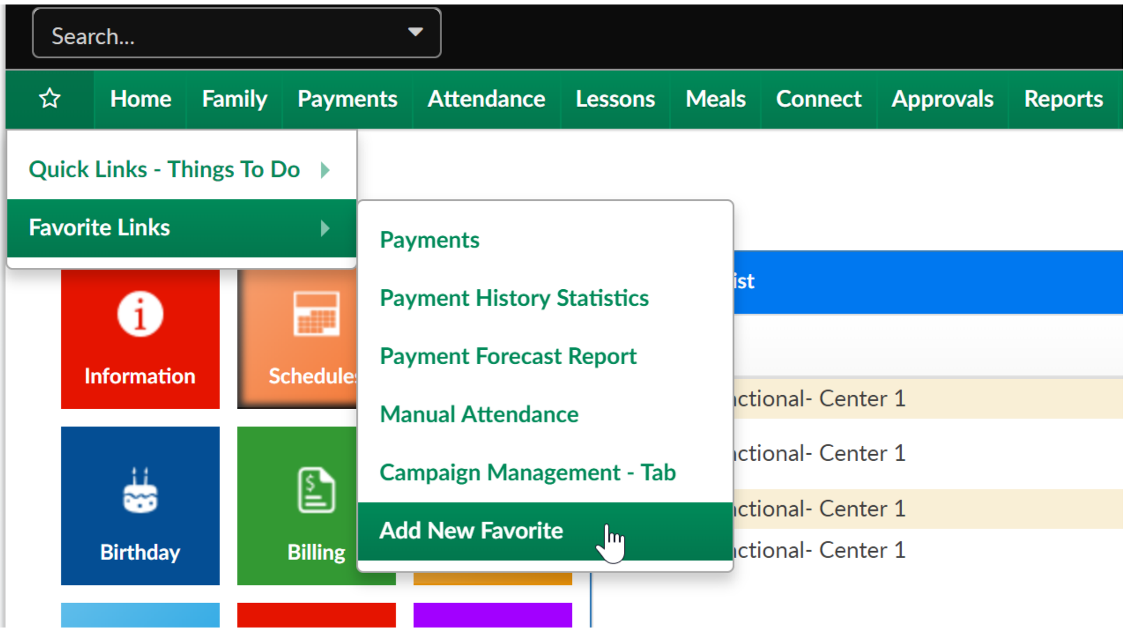
	Center	Family	Amount Received	Payment Type	Transaction #
☑	DCW Transactional-CENTER 1	Doolittle Family	$ 60.00	Cash	
☑	DCW Transactional-CENTER 1	Brave Family	$ 277.25	Check	12345
☑	DCW Transactional-CENTER 1	Doolittle Family	$ 105.00	Check	
☑	DCW Transactional-CENTER 1	Frozen Family	$ 300.00	Check	12345

Export options: CSV | Excel | XML

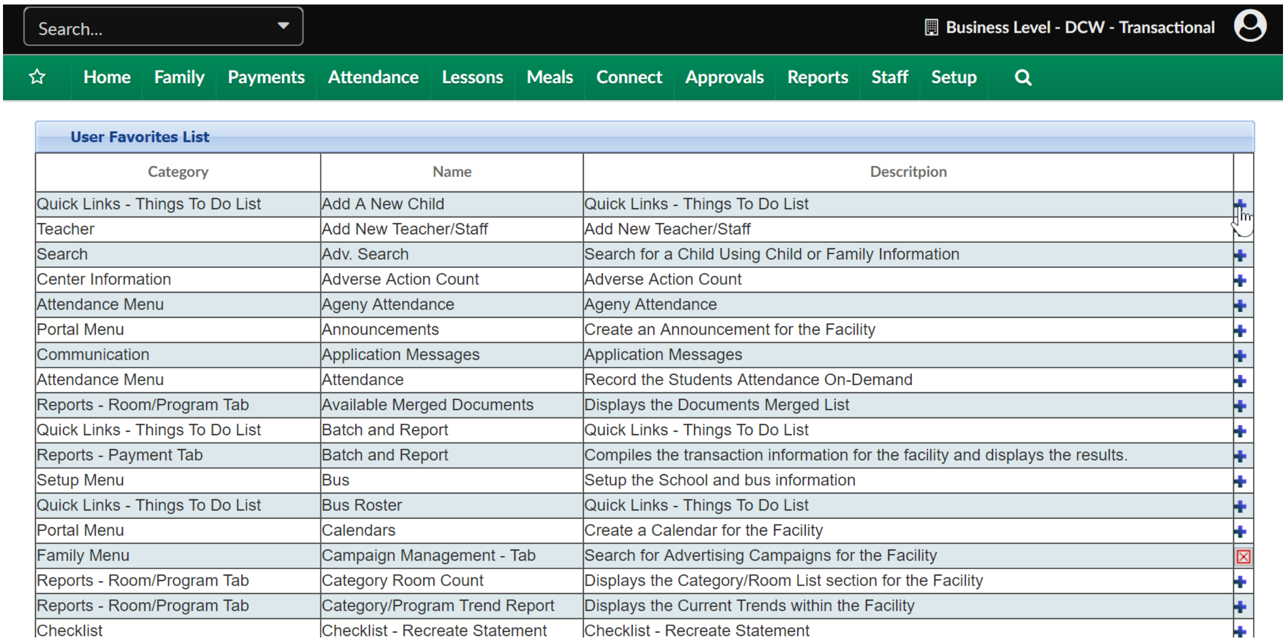
Favorites

Last Modified on 12/27/2017 11:06 am EST

From the menu bar, select the star icon. Hover over the Favorites Links option- any existing favorites will display. To add or remove a favorite option select the Add New Favorite option.



On the Add New Favorite screen select the plus button to add or the x button to remove.



User Favorites List

Category	Name	Descritpion	
Quick Links - Things To Do List	Add A New Child	Quick Links - Things To Do List	+
Teacher	Add New Teacher/Staff	Add New Teacher/Staff	
Search	Adv. Search	Search for a Child Using Child or Family Information	+
Center Information	Adverse Action Count	Adverse Action Count	+
Attendance Menu	Ageny Attendance	Ageny Attendance	+
Portal Menu	Announcements	Create an Announcement for the Facility	+
Communication	Application Messages	Application Messages	+
Attendance Menu	Attendance	Record the Students Attendance On-Demand	+
Reports - Room/Program Tab	Available Merged Documents	Displays the Documents Merged List	+
Quick Links - Things To Do List	Batch and Report	Quick Links - Things To Do List	+
Reports - Payment Tab	Batch and Report	Compiles the transaction information for the facility and displays the results.	+
Setup Menu	Bus	Setup the School and bus information	+
Quick Links - Things To Do List	Bus Roster	Quick Links - Things To Do List	+
Portal Menu	Calendars	Create a Calendar for the Facility	+
Family Menu	Campaign Management - Tab	Search for Advertising Campaigns for the Facility	☒
Reports - Room/Program Tab	Category Room Count	Displays the Category/Room List section for the Facility	+
Reports - Room/Program Tab	Category/Program Trend Report	Displays the Current Trends within the Facility	+
Checklist	Checklist - Recreate Statement	Checklist - Recreate Statement	+

Note: Not every page or report is available in this favorites section. Favorites are dictated for each individual user- not globally or by user group.

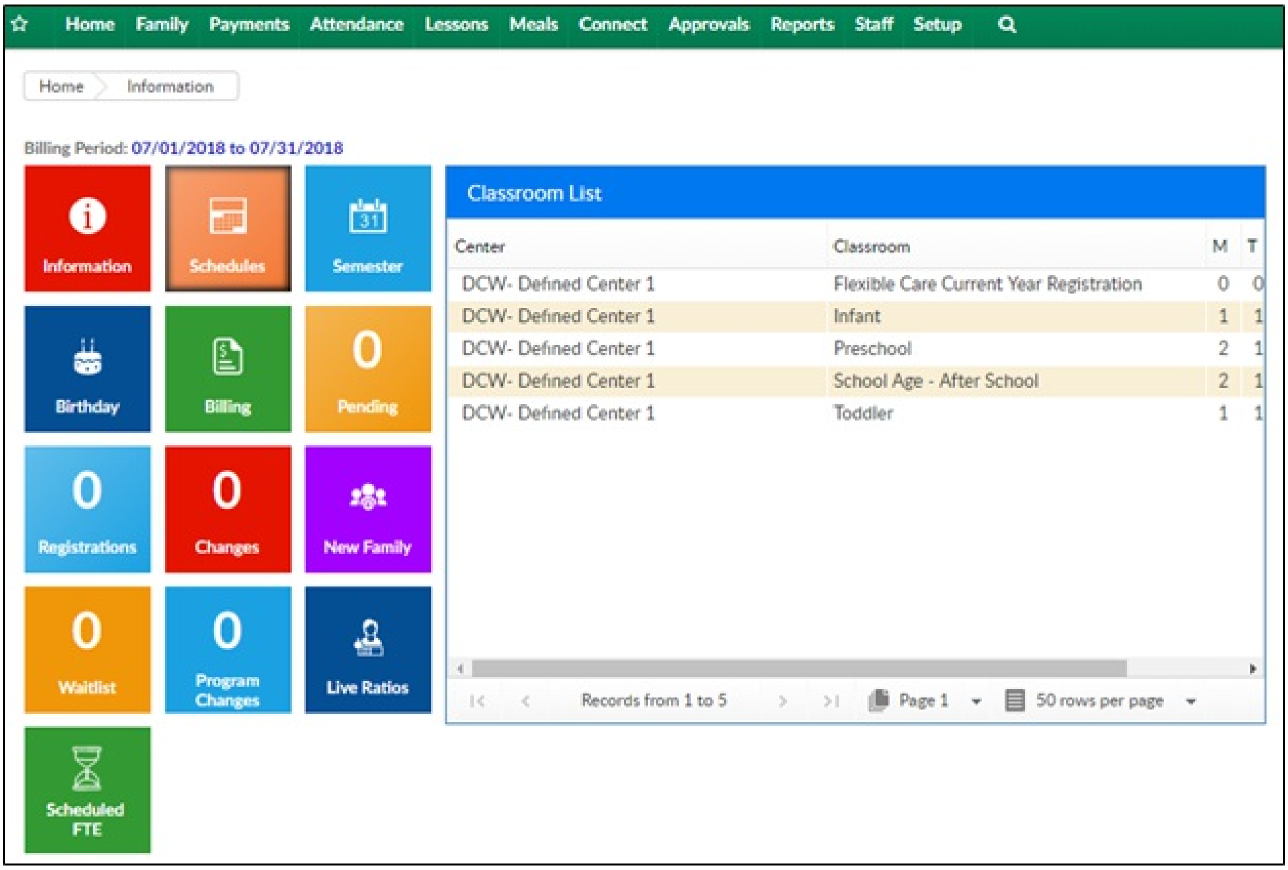
Home > Information

Last Modified on 11/06/2018 4:13 pm EST

When logging into the system the first screen you will see is the Information screen. This screen contains several pieces of information.

- The currently billing period dates
- Tiles on the left side of the screen. Clicking the tiles will either direct you to the requested page (i.e., Registrations, Waitlist, Billing, etc.) or display information on the right
- Various information on the right side of the screen

The screen is made up of tiles on the left and information on the right. Each tile will either direct you to the correct page or will display information on the right. Upon initially logging in, the Classroom List will display. This list contains the Center, Classroom, and how many children per day.



Billing Period: 07/01/2018 to 07/31/2018

Classroom List

Center	Classroom	M	T
DCW- Defined Center 1	Flexible Care Current Year Registration	0	0
DCW- Defined Center 1	Infant	1	1
DCW- Defined Center 1	Preschool	2	1
DCW- Defined Center 1	School Age - After School	2	1
DCW- Defined Center 1	Toddler	1	1

Home > Information, Tiles

Last Modified on 12/04/2018 9:46 am EST

On the home page, the square icons display the navigation tiles.

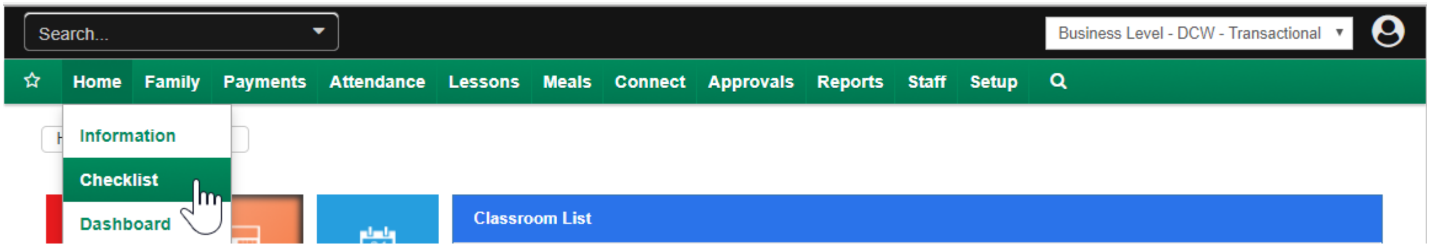
Information	• Basic site information ◦ Information is updated in batch format and may not be up to date ◦ Displays information such as: Pending students, total net revenue, total payments, registration requests
Schedules	• Schedule information ◦ Center ◦ Classroom ◦ Number of students scheduled per day
31 Semester	• Total enrollment for a semester ◦ By site and room ◦ Click the magnifying glass to see child details
Birthday	• Displays child birthdays and staff anniversaries & birthdays ◦ Staff details will be noted with an icon
Billing	• View billing period summaries
0 Pending	• Able to view Pending and Rejected student registration
0 Registrations	• Any new family registration from the site's new registration page • Children can be approved/rejected from this page
0 Changes	• Children who have pending changes for approval • Personal information updates are submitted via parent portal

New Family	• Must add a new child before a family can be created • This icon will direct you to the “Add a New Child ” page
0 Waitlist	• Displays existing child registration from the parent portal or waitlist registration if a room is full ◦ Registration can be approved/rejected from here
0 Program Changes	• Displays requests for schedule changes enter by parents ◦ This option must be enabled at the category/room to allow
Live Ratios	• Live Ratios displays the student/teacher ratios for each site ◦ To review these details, you must be in the center level, not business level
Scheduled FTE	• Will display FTE for current week

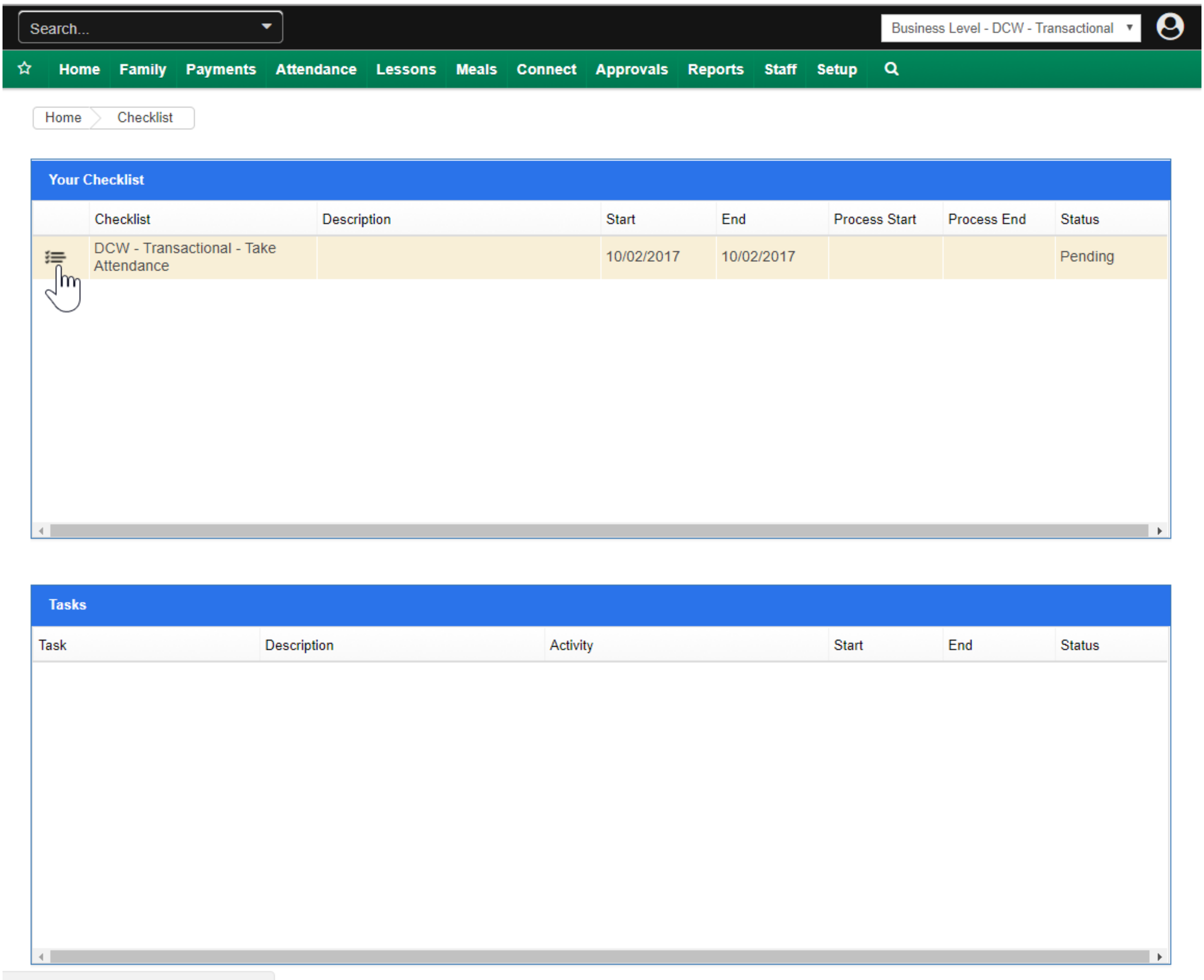
Home > Checklist

Last Modified on 10/02/2017 3:07 pm EDT

Based on user role, checklists can be created to let staff know essential tasks that should be completed . When a user logs in and navigates to Home > Checklist, the list of tasks that have been assigned will display.



To view specific tasks to complete the user would select the three black line icon to the left of the Checklist item.



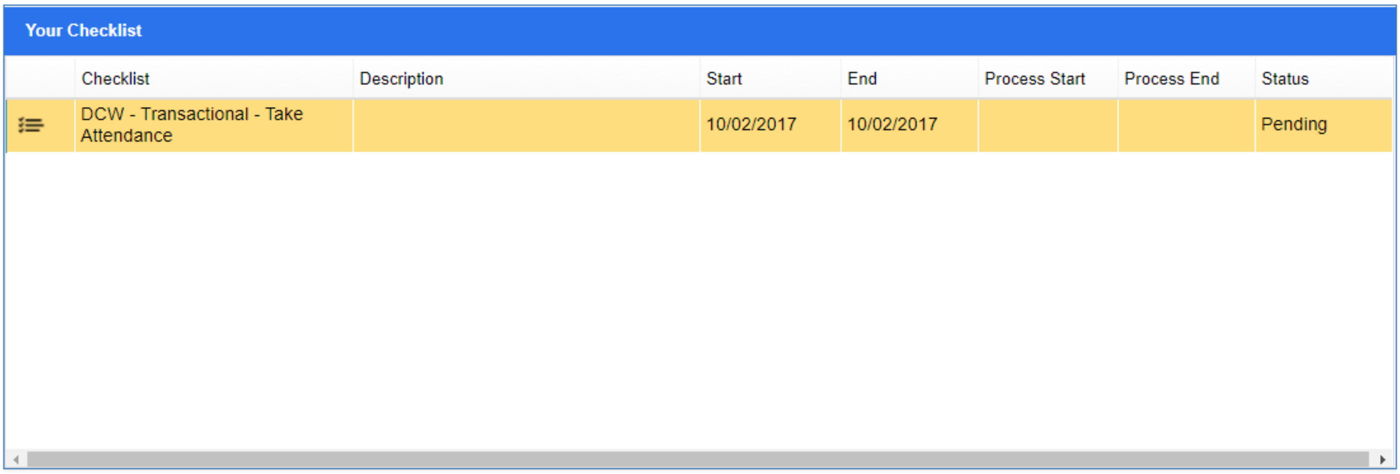
Your Checklist

	Checklist	Description	Start	End	Process Start	Process End	Status
☰	DCW - Transactional - Take Attendance		10/02/2017	10/02/2017			Pending

Tasks

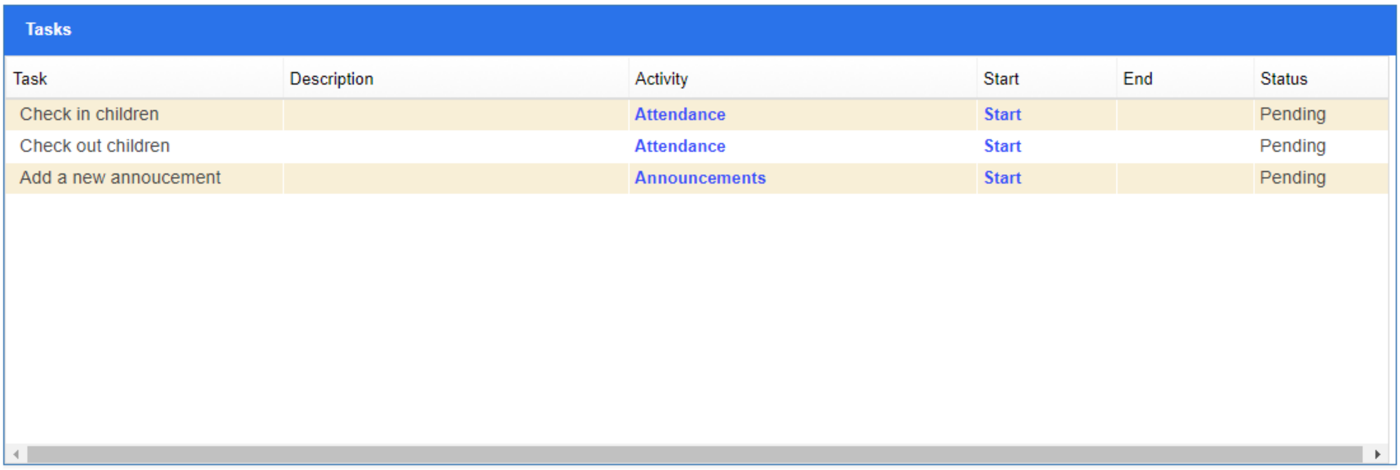
Task	Description	Activity	Start	End	Status

Tasks display below the Checklist item, to Start the task select the "Start" link.



Your Checklist

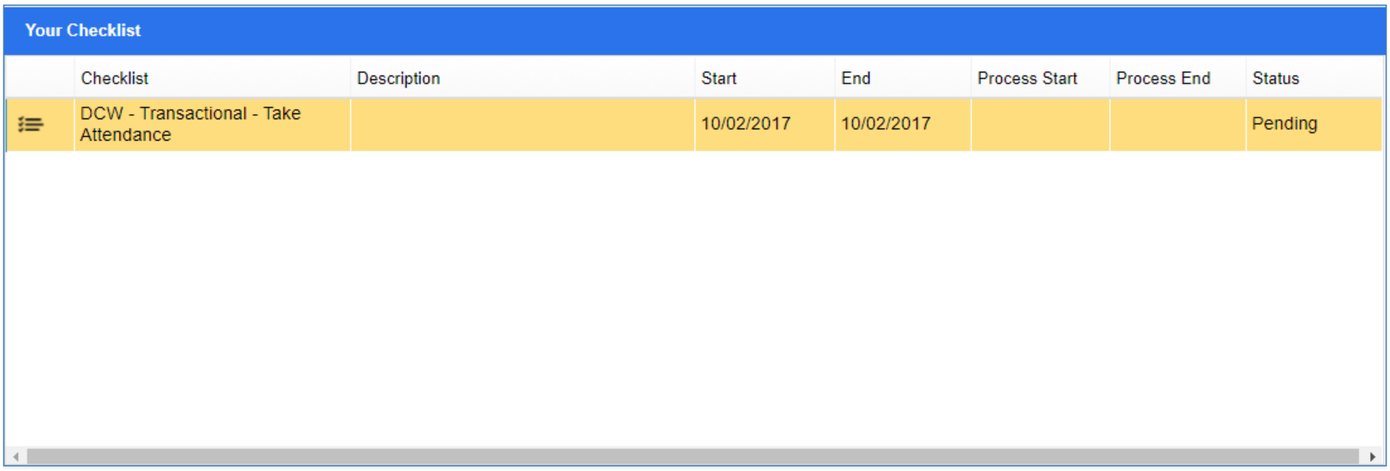
	Checklist	Description	Start	End	Process Start	Process End	Status
☰	DCW - Transactional - Take Attendance		10/02/2017	10/02/2017			Pending



Tasks

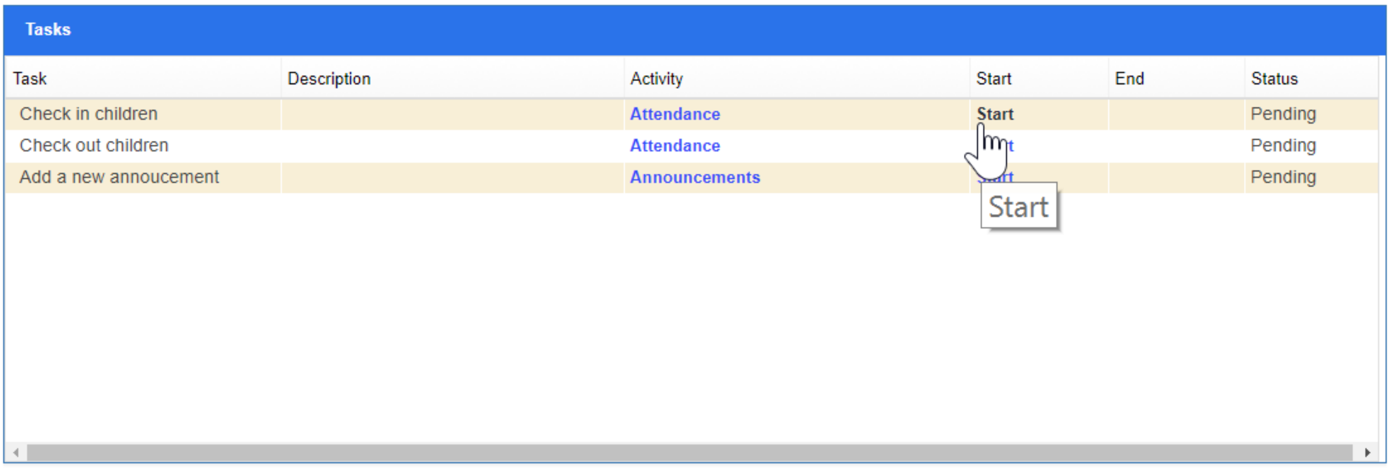
Task	Description	Activity	Start	End	Status
Check in children		Attendance	Start		Pending
Check out children		Attendance	Start		Pending
Add a new annoucement		Announcements	Start		Pending

To jump to the task location, select the link under the activity name.



Your Checklist

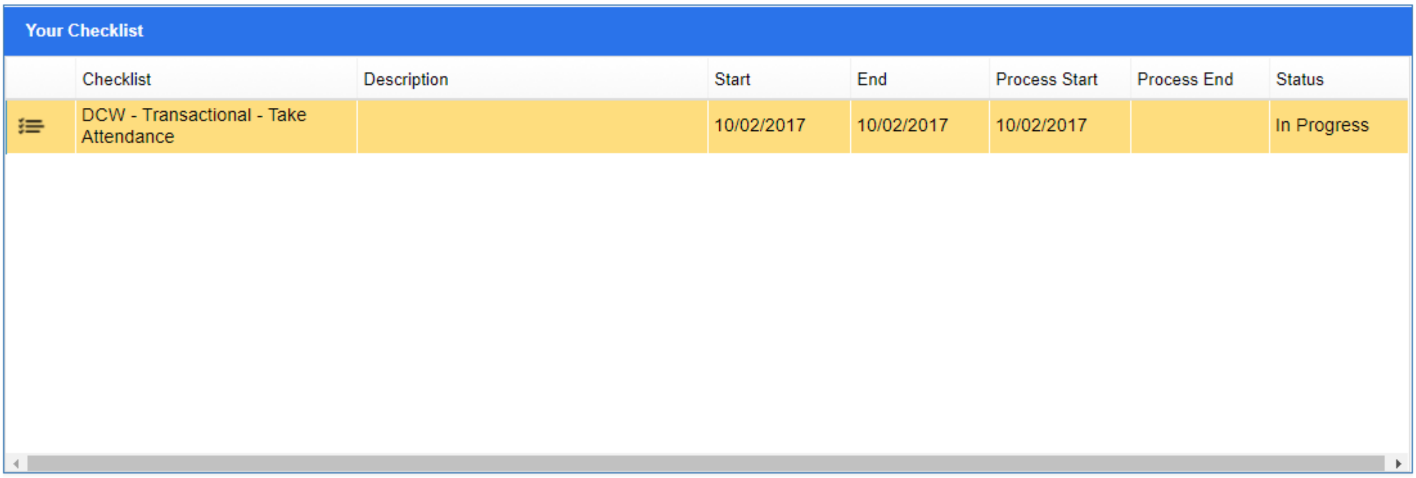
	Checklist	Description	Start	End	Process Start	Process End	Status
	DCW - Transactional - Take Attendance		10/02/2017	10/02/2017			Pending



Tasks

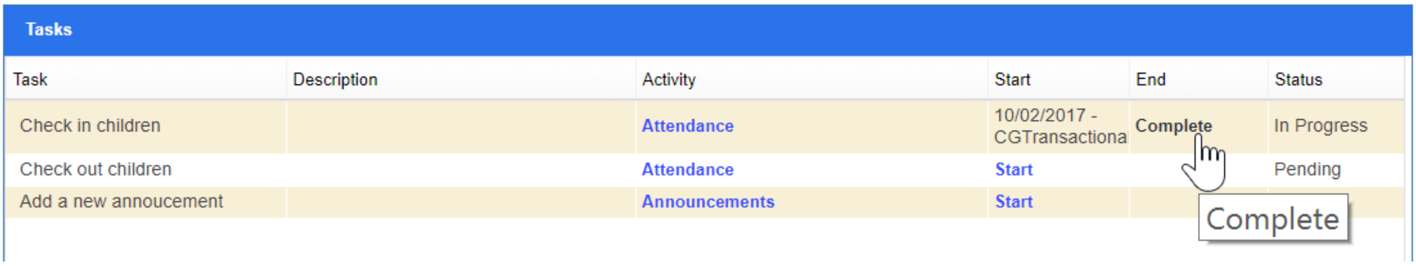
Task	Description	Activity	Start	End	Status
Check in children		Attendance	Start		Pending
Check out children		Attendance	Start		Pending
Add a new annoucement		Announcements	Start		Pending

Once the task has been completed, go to Home > Checklist and mark as complete-



Your Checklist

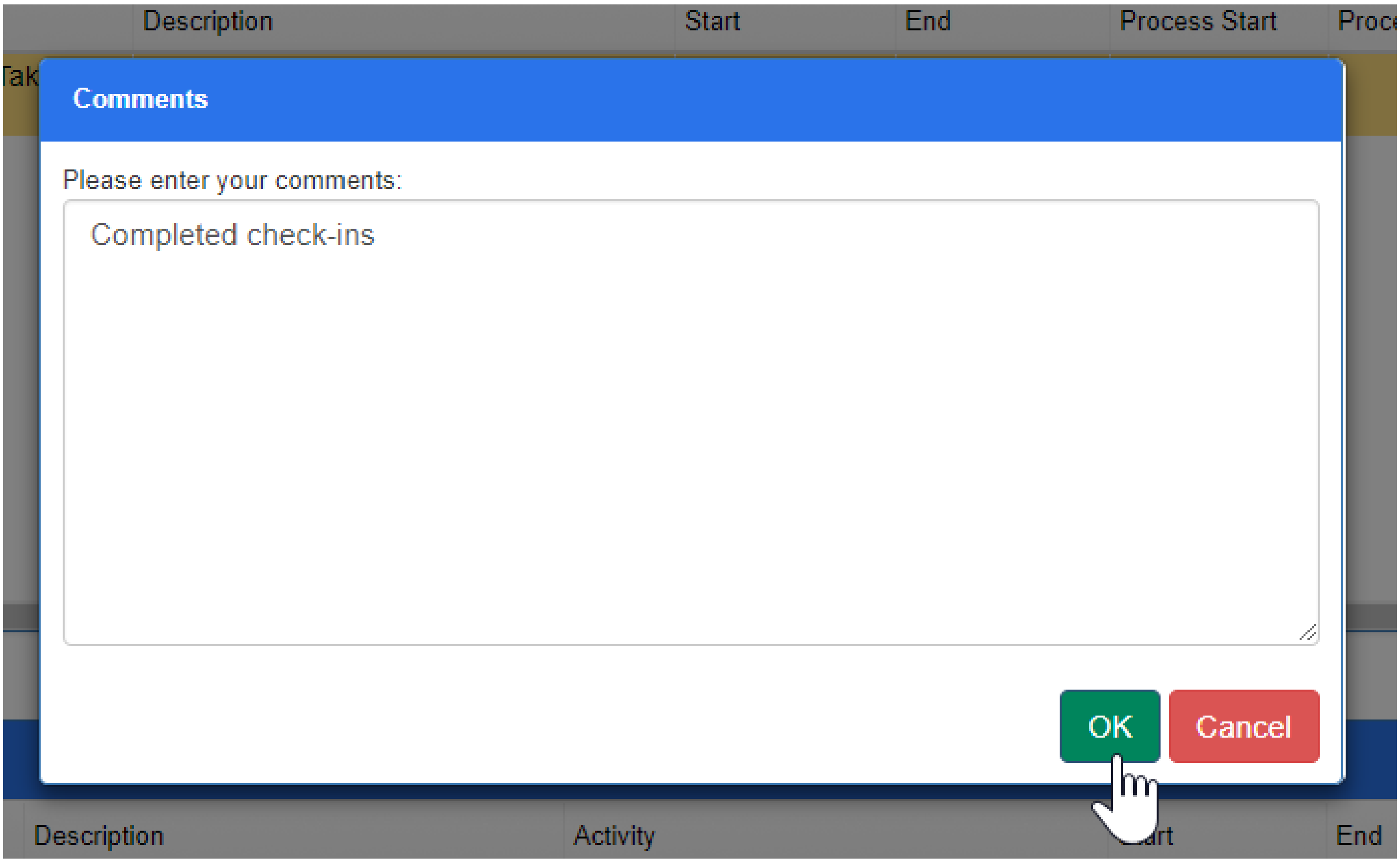
	Checklist	Description	Start	End	Process Start	Process End	Status
	DCW - Transactional - Take Attendance		10/02/2017	10/02/2017	10/02/2017		In Progress



Tasks

Task	Description	Activity	Start	End	Status
Check in children		Attendance	10/02/2017 - CGTransactiona	Complete	In Progress
Check out children		Attendance	Start		Pending
Add a new annoucement		Announcements	Start		

Once Complete is selected a Comment box will display, after entering any related comments select OK to continue.



Completed check-ins

The user would then move on to complete the next task. At the end of the day all of the user's tasks should be completed.

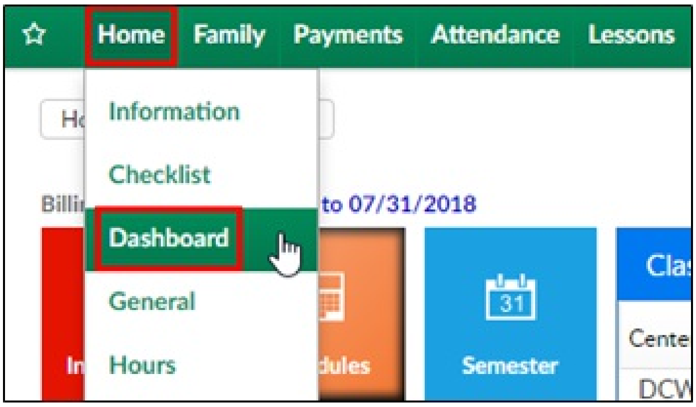
Click here to see how to add checklists and tasks by user role!

Home > Dashboard

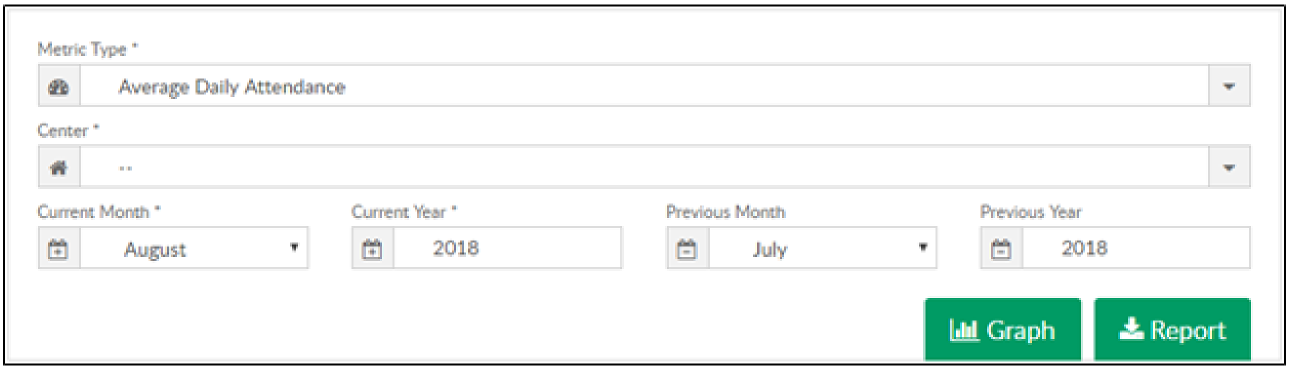
Last Modified on 12/04/2018 9:40 am EST

The Dashboard allows users to quickly view metrics through analytics. This is most commonly used by business level administration.

1. Click Home from the navigator bar and select Dashboard



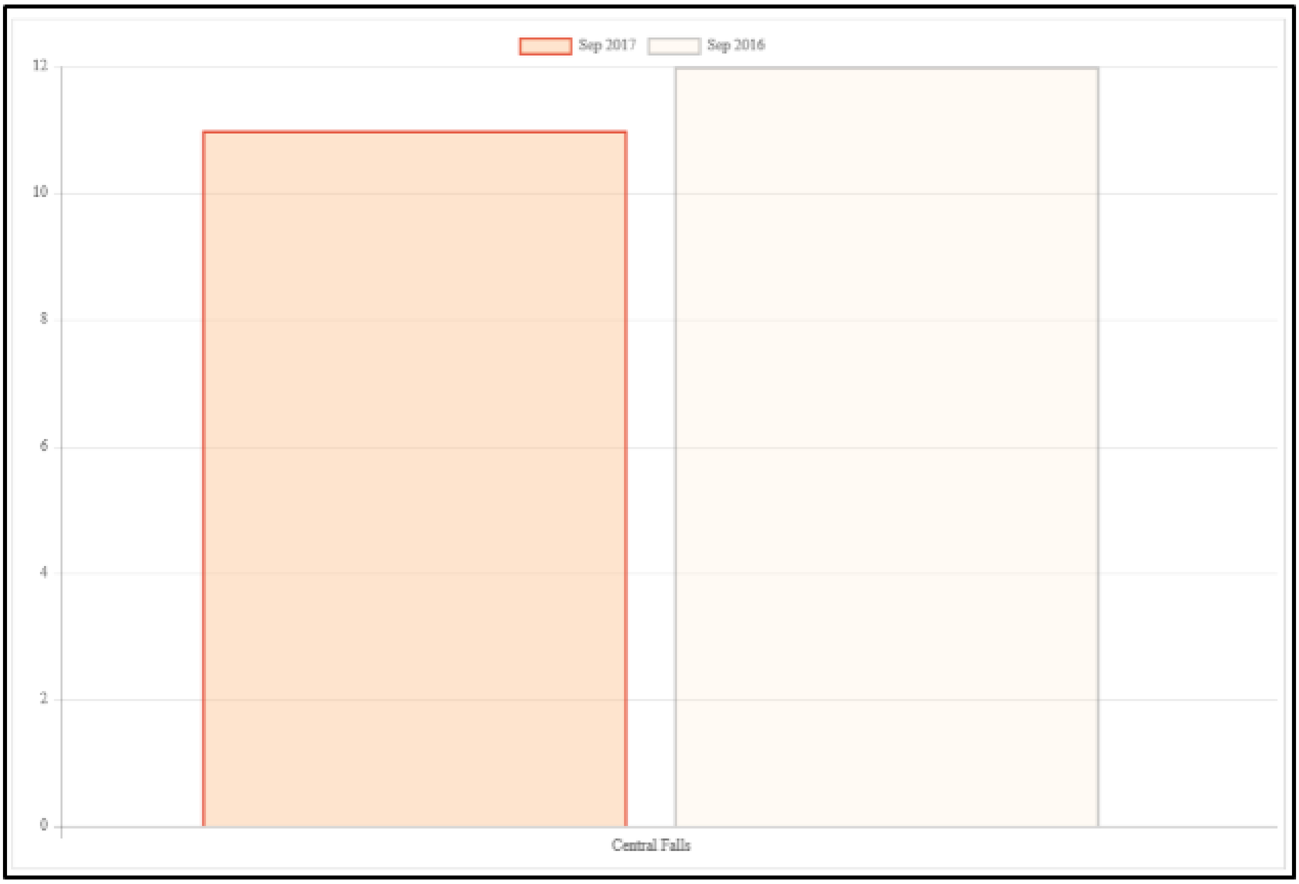
2. Choose a Metric Type from the drop-down menu
3. After choosing the metric type, more search options will appear



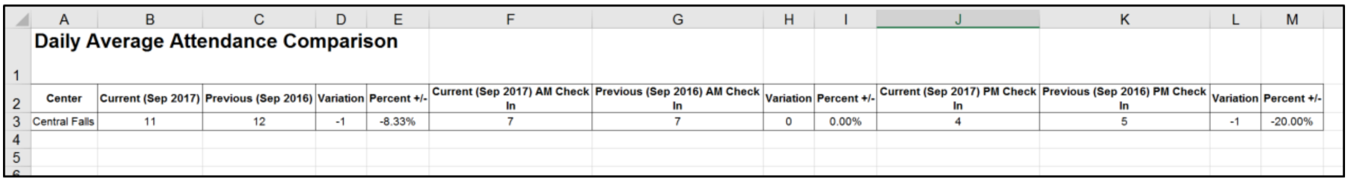
Metric Type *
Average Daily Attendance
Center *
--
Current Month * August
Current Year * 2018
Previous Month July
Previous Year 2018

    - Choose the center
    - Select the Current month and year
    - Select previous month or year if necessary, but not required

4. Click Graph to view a comparison graph of the chosen metric



5. Click Report to receive an Excel file of the data



Daily Average Attendance Comparison

Center	Current (Sep 2017)	Previous (Sep 2016)	Variation	Percent +/-	Current (Sep 2017) AM Check In	Previous (Sep 2016) AM Check In	Variation	Percent +/-	Current (Sep 2017) PM Check In	Previous (Sep 2016) PM Check In	Variation	Percent +/-
Central Falls	11	12	-1	-8.33%	7	7	0	0.00%	4	5	-1	-20.00%

Home > General

Last Modified on 03/14/2018 9:12 am EDT

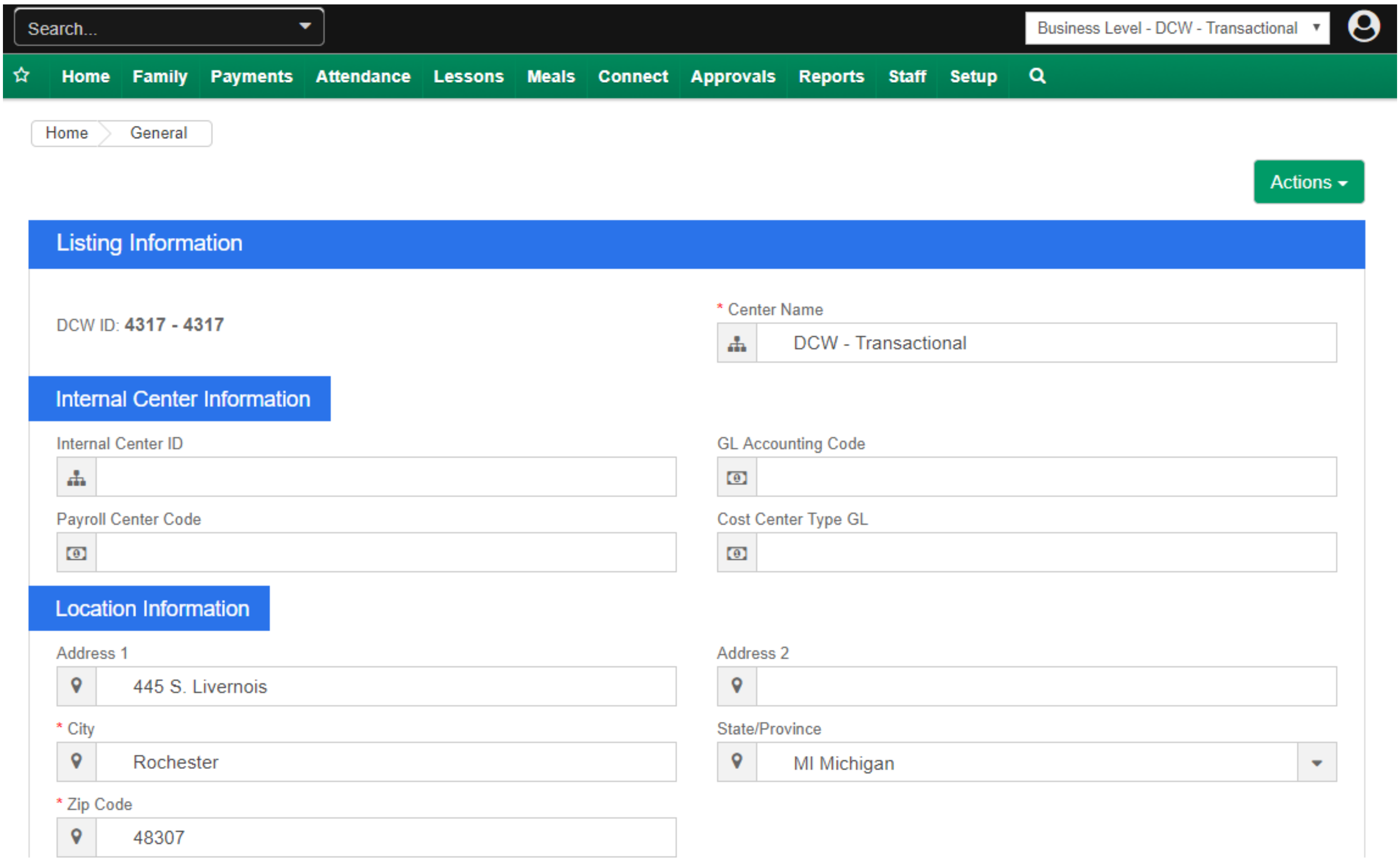
The Home > General tab displays center information, location, license, CACFP detail and more!

Listing Information

To edit any of the fields displayed on this page click into the field and begin typing. Be sure to save your work by scrolling to the bottom of the page and pressing save.

The DCW ID is the site number. This number will not be displayed elsewhere in the system.

The Center Name is the name of the center or site. This name will appear on statements that go out to families.



DCW ID: **4317 - 4317**

* Center Name: DCW - Transactional

Internal Center ID:

GL Accounting Code:

Payroll Center Code:

Cost Center Type GL:

Address 1: 445 S. Livernois

Address 2:

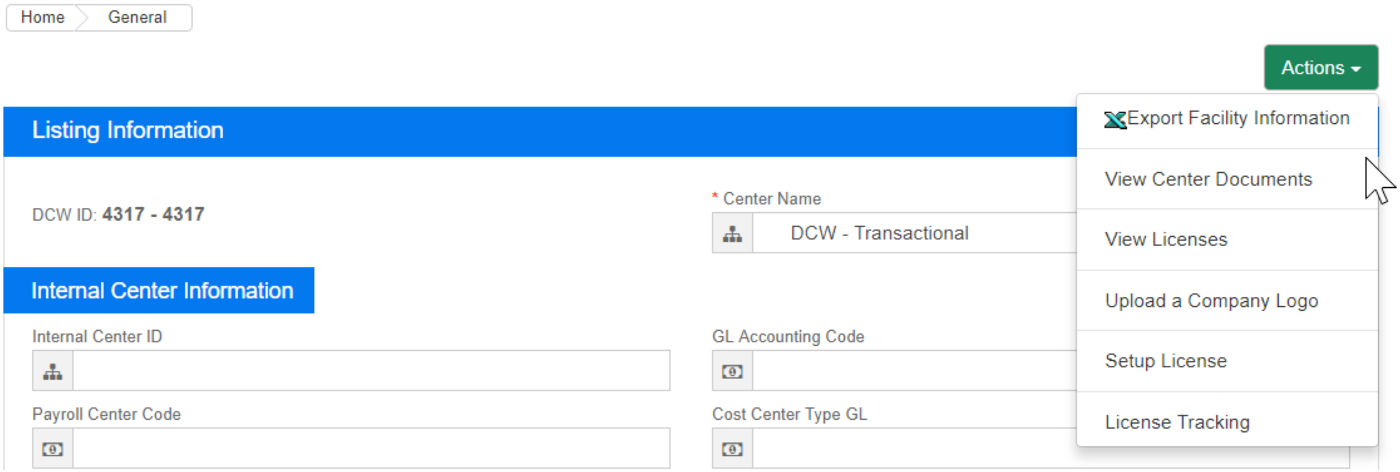
* City: Rochester

State/Province: MI Michigan

* Zip Code: 48307

Actions Menu

The actions menu links users to specific facility information.

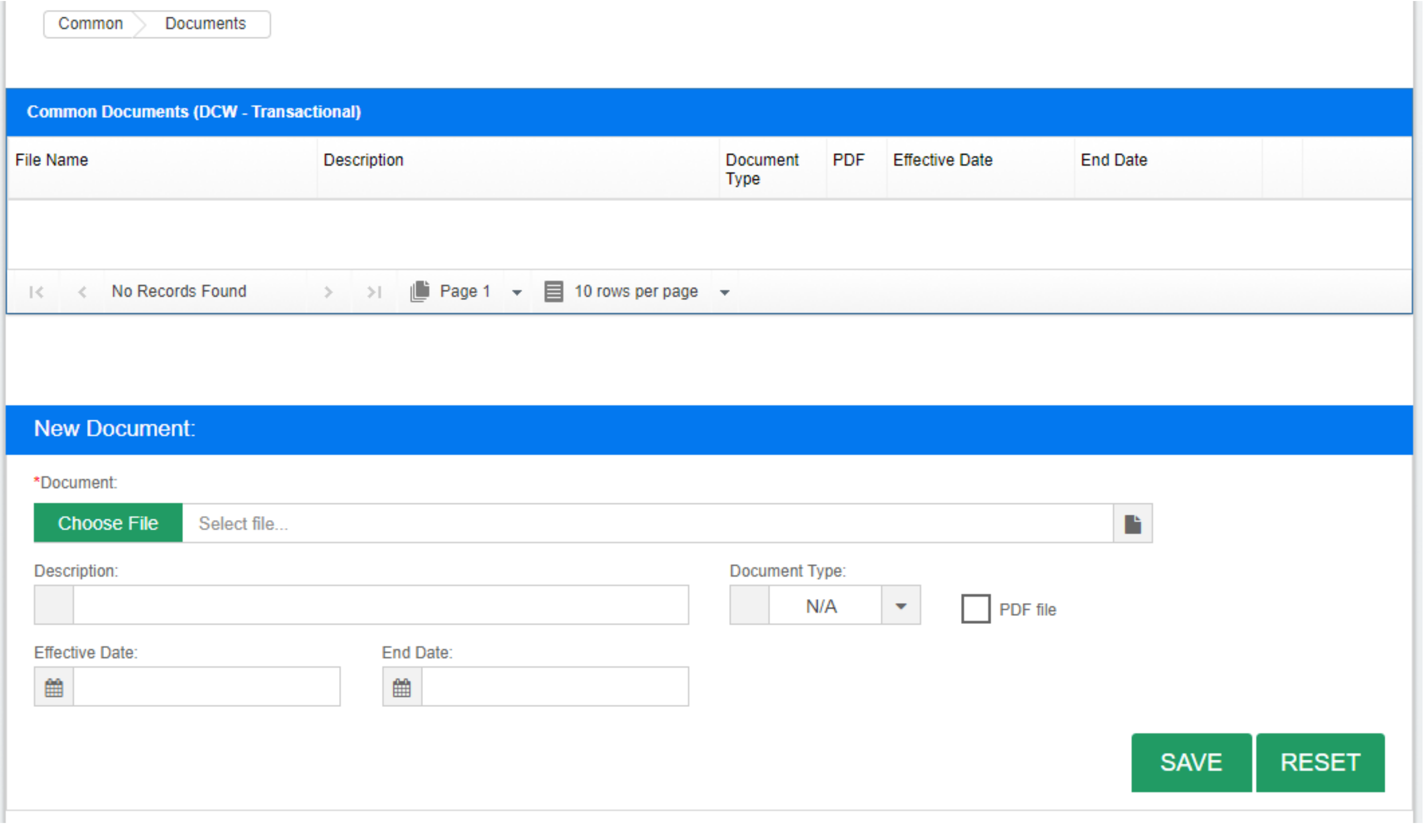


DCW ID: 4317 - 4317

* Center Name: DCW - Transactional

Select the Actions icon to:

- Export Facility Information- all business level and center detail from the Home > General tab are exported to an Excel type file.
- View Center Documents- displays all documents that have been uploaded.



No Records Found

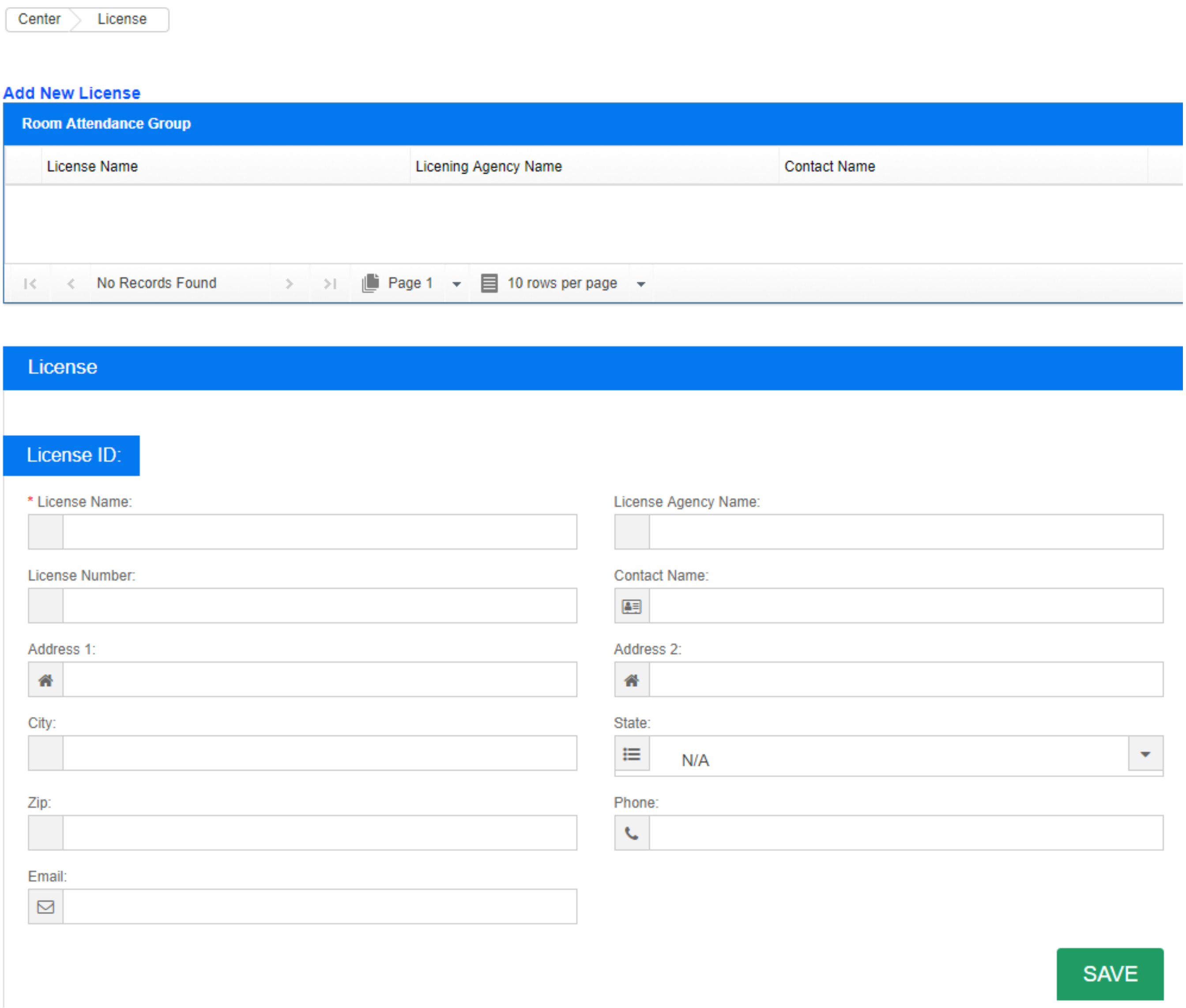
Page 1

10 rows per page

Document Type: N/A

☐ PDF file

- View Licenses- Allows users to view uploaded documents and license information-



Room Attendance Group

License Name	Licening Agency Name	Contact Name

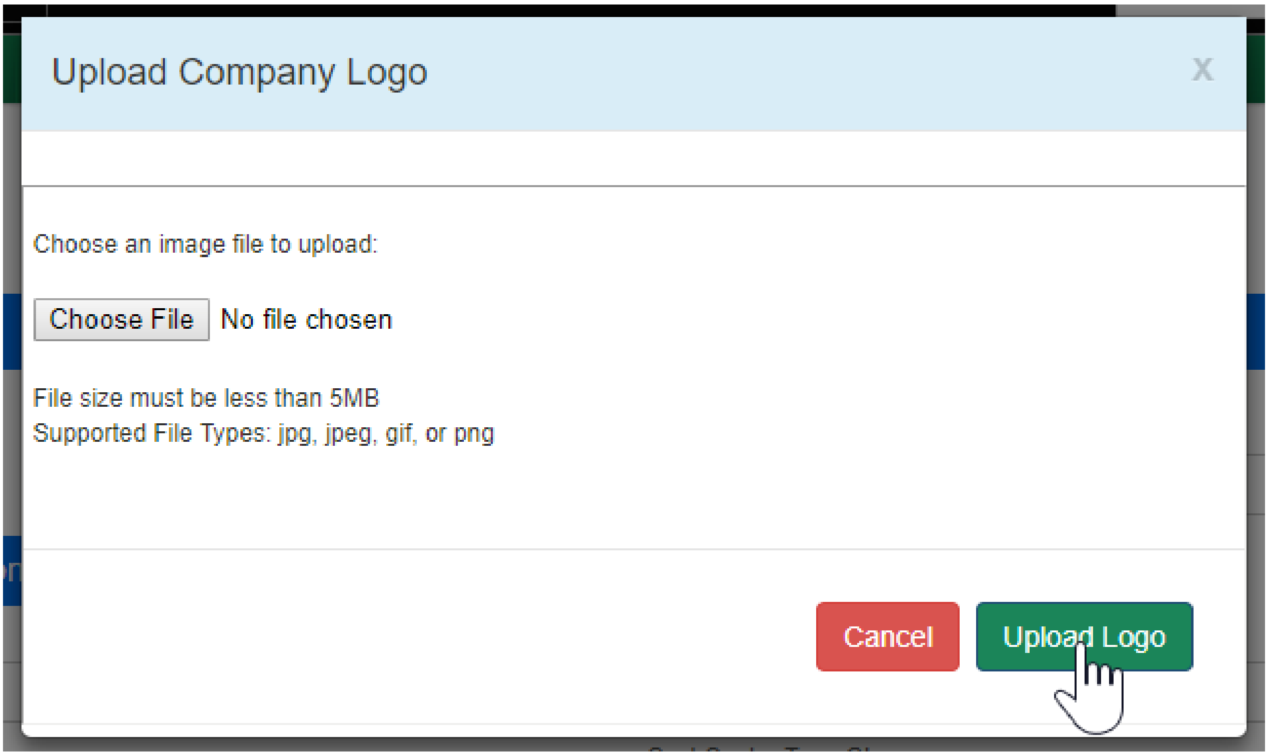
No Records Found
Page 1
10 rows per page

License

License ID:

* License Name:
License Agency Name:
License Number:
Contact Name:
Address 1:
Address 2:
City:
State: N/A
Zip:
Phone:
Email:

- Upload Company Logo- allows users to upload a logo for a specific site/center-



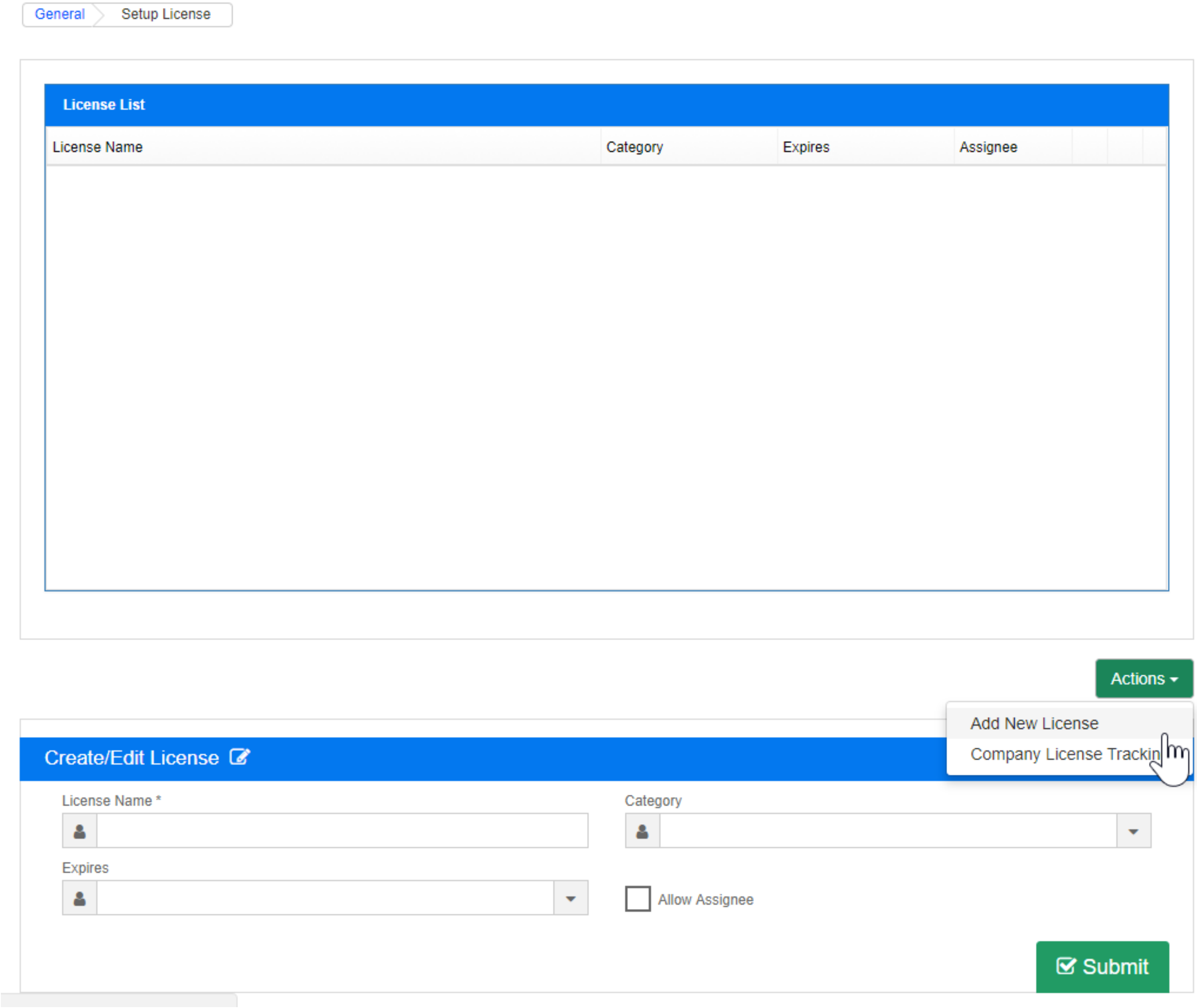
Upload Company Logo

Choose an image file to upload:

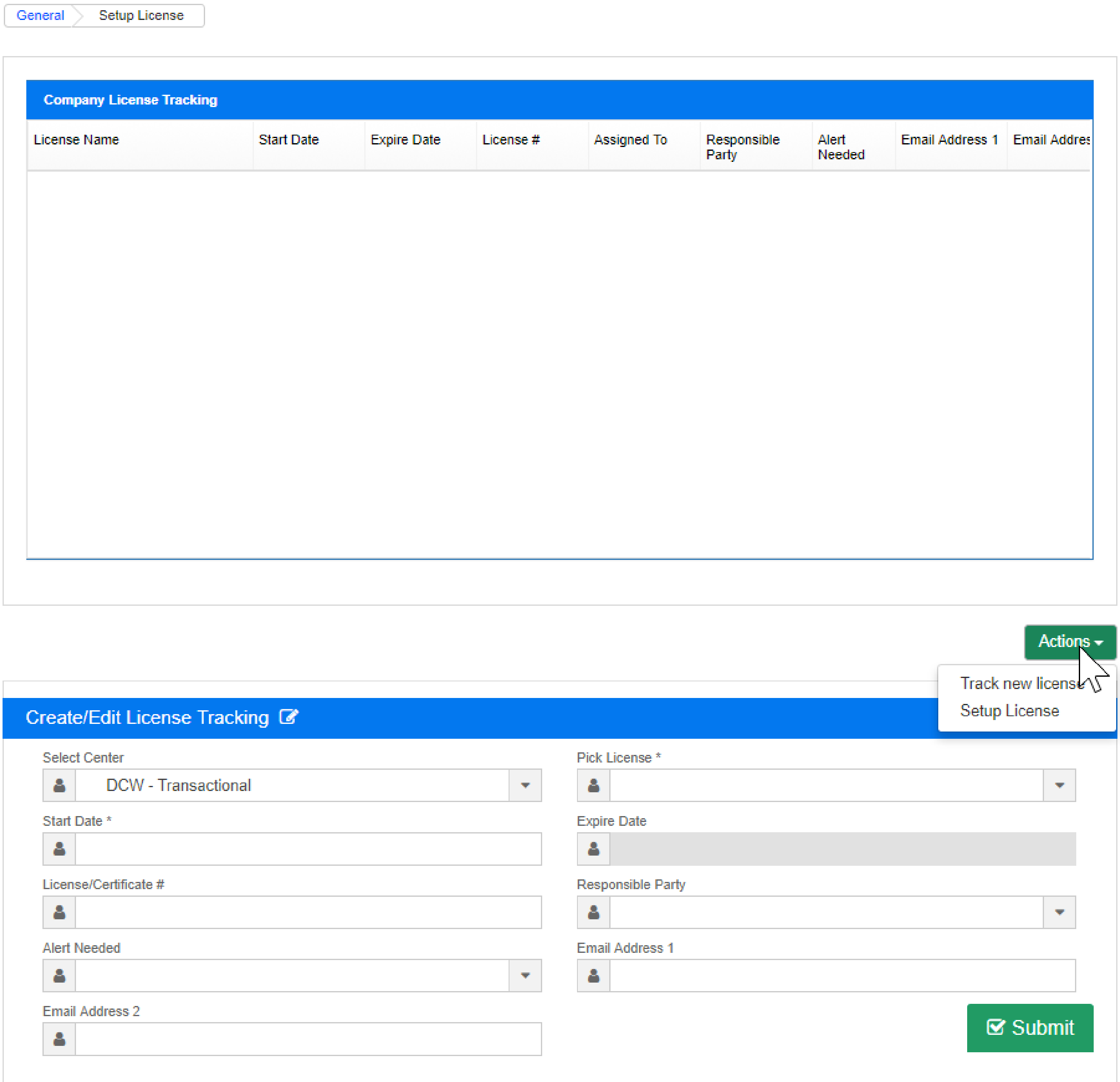
No file chosen

File size must be less than 5MB
Supported File Types: jpg, jpeg, gif, or png

- Setup License- allows users to add license information



- License Tracking-



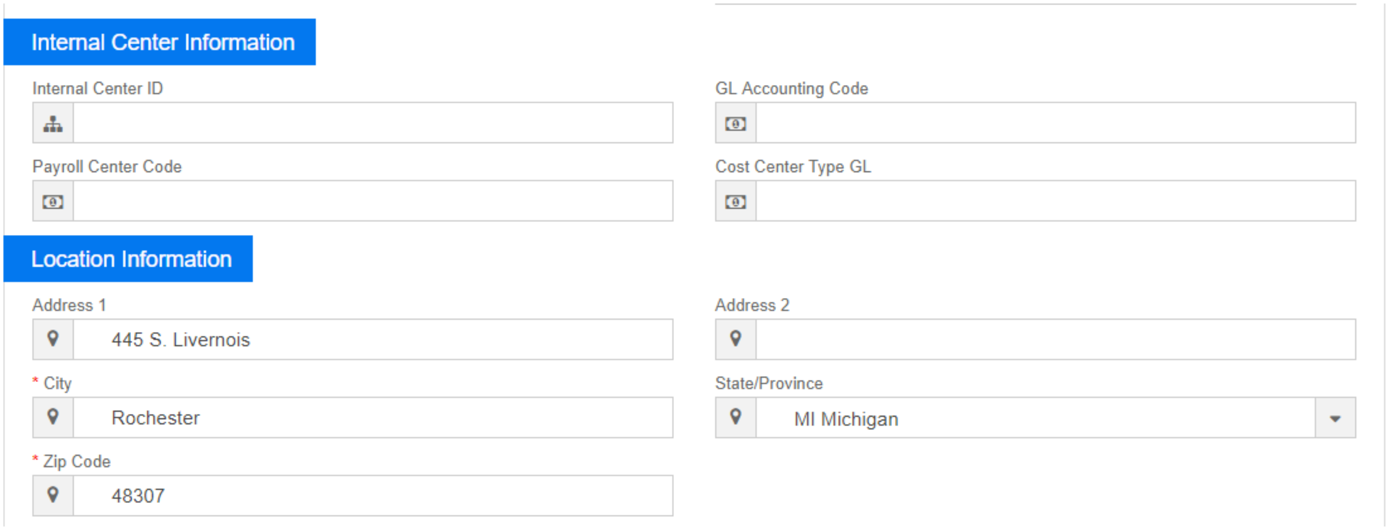
Company License Tracking

License Name	Start Date	Expire Date	License #	Assigned To	Responsible Party	Alert Needed	Email Address 1	Email Addres

Create/Edit License Tracking

Select Center: DCW - Transactional
Pick License *:
Start Date *:
Expire Date:
License/Certificate #:
Responsible Party:
Alert Needed:
Email Address 1:
Email Address 2:

Internal Center Information



Internal Center Information

Internal Center ID:
GL Accounting Code:
Payroll Center Code:
Cost Center Type GL:

Location Information

Address 1: 445 S. Livernois
Address 2:
* City: Rochester
State/Province: MI Michigan
* Zip Code: 48307

Internal Center ID- the identification used internally by the center to identify itself.

Enter the general ledger accounting code for the center in the GL Accounting Code text box. This field can be used when setting up your general ledger codes.

The fields below will only display if you are configured for them, they are optional and will not be used for most setups/configurations.

If the center is associated to a rate level, click on the blue i icon. The Rate Level section will not be displayed unless a rate level is setup in the Rates section.

If the center is associated to a subsidiary, select the subsidiary in the Subsidiary drop down list. The Subsidiary drop down list will not be displayed unless a Subsidiary is setup in the Valid Value section.

If the center is associated to a brand, select the brand in the Brand drop down list. The Brand drop down list will not be displayed unless a Brand is setup in the Valid Value section.

If the center is part of a division, select the division in the Division drop down list. The Division drop down list will not be displayed unless a Division is setup in the Valid Value section.

If the center is a part of a district, select the district in the District drop down list. The District drop down list will not be displayed unless a District is setup in the Valid Value section.

If the center is associated to a GL Department, select the GL Department in the GL Department drop down list. The GL Department drop down list will not be displayed unless a GL Department is setup in the Valid Value section.

If the center is associated to a payroll center, enter the payroll center code in the Payroll Center Code text box.

If the center is associated to a cost center general ledger code, enter the cost center general ledger code in the Cost Center Type GL text box.

Location Information

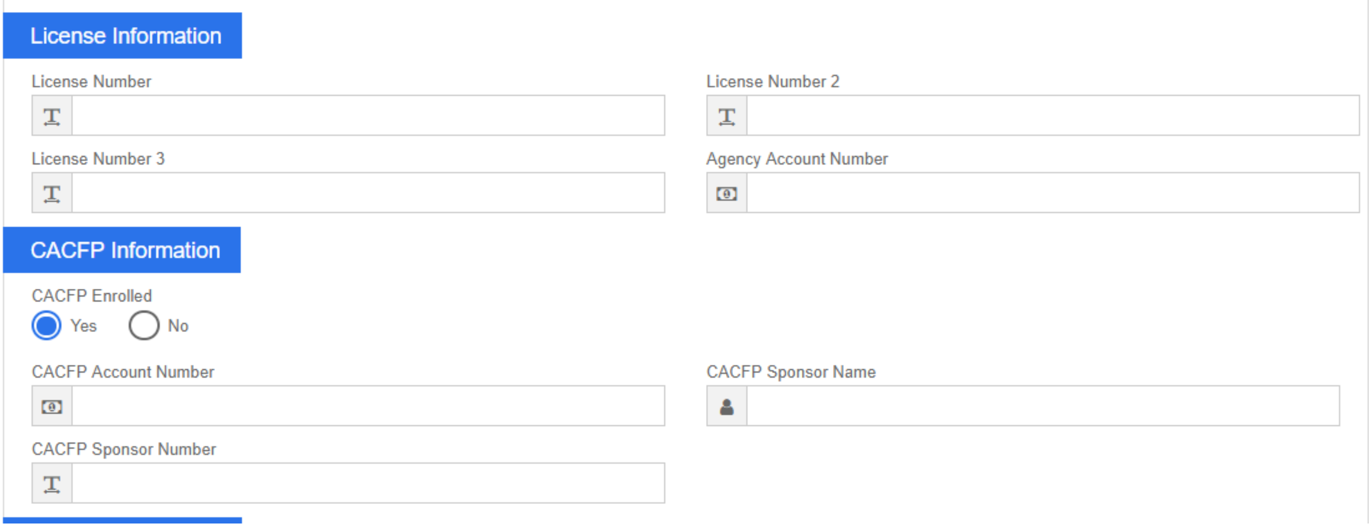
Enter the street address for the center in the Address 1 text box.

If the center has secondary address information, such as a suite, floor or office number, enter that information in the Address 2 text box.

Enter the city the center is located in, in the City text box.

Select the state the center is located in, in the State drop down list.

Enter the zip code for the center in the Zip Code text box.



CACFP Enrolled
● Yes ○ No

License Information

Enter the license number for the center in the License Number text box.

If the center has multiple licenses, enter the remaining licenses in the License Number 2 and License Number 3 text boxes.

Enter the agency account number for the center in the Agency Account Number text box.

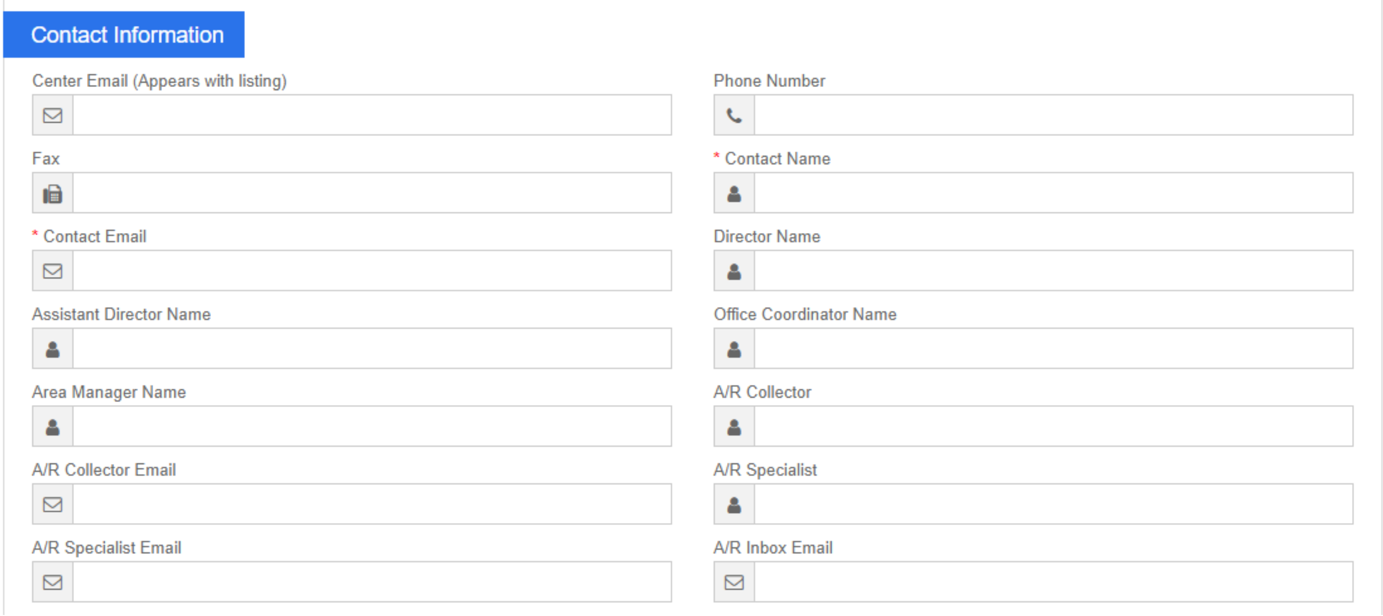
CACFP Information

If the center is a member of the Child and Adult Care Food Program (CACFP), select Yes in the CACFP Enrolled section.

Enter the Center’s CACFP account number in the CACFP Account Number text box.

Enter the name of the sponsor associated to the CACFP account in the CACFP Sponsor Name text box.

Enter the phone number to contact the sponsor for the CACFP account in the CACFP Sponsor Number text box.



Contact Information

Center Email (Appears with listing)

Phone Number

Fax

* Contact Name

* Contact Email

Director Name

Assistant Director Name

Office Coordinator Name

Area Manager Name

A/R Collector

A/R Collector Email

A/R Specialist

A/R Specialist Email

A/R Inbox Email

Contact Information

Enter the contact email address for the center in the Center Email text box. This email address will appear on the the system listing.

Enter the phone number for the center in the Phone Number text box.

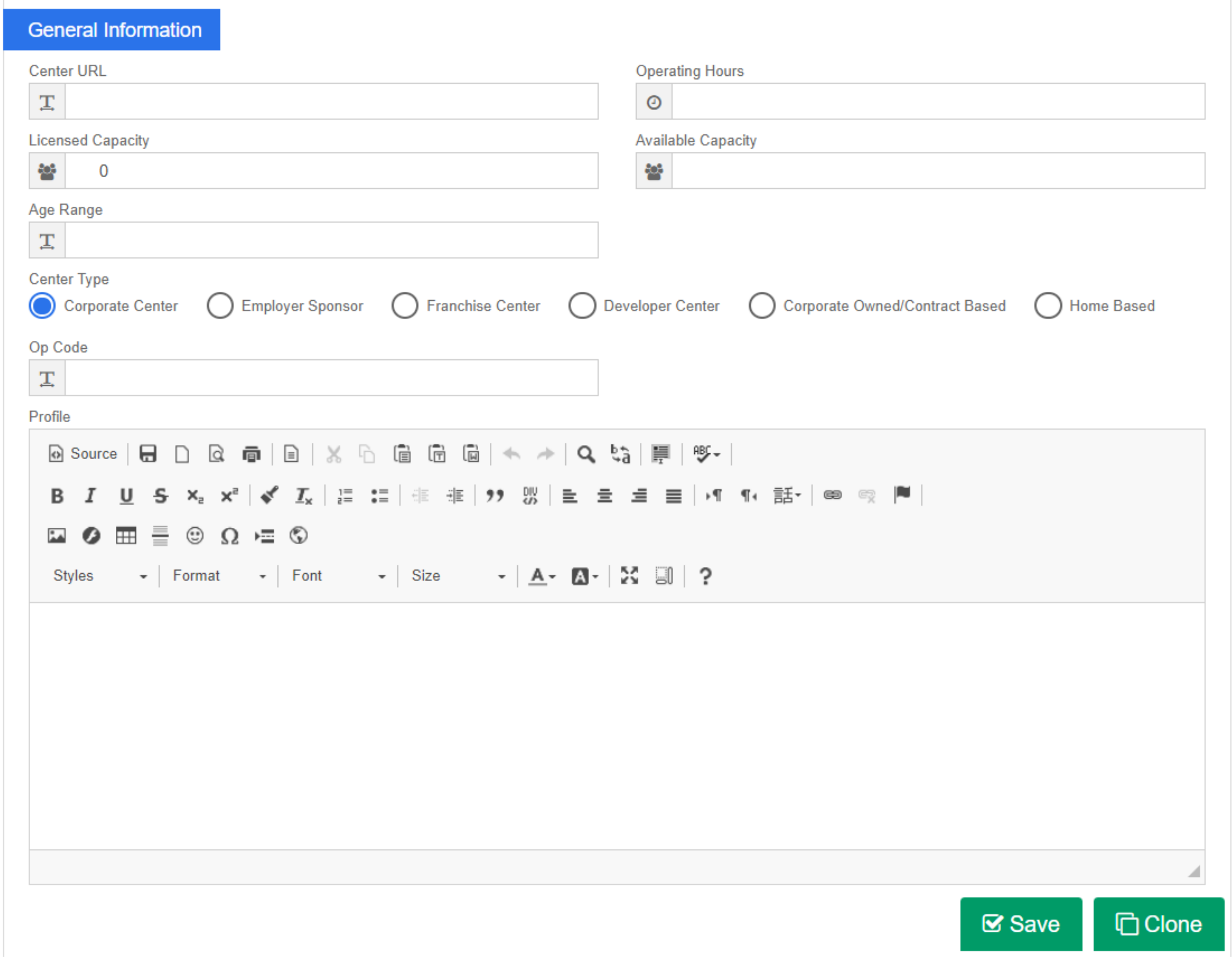
If the center has a fax number, enter the phone number for the fax in the Fax text box.

Enter the name of the contact for the center in the Contact Name text box.

Enter the email address for the contact for the center in the Contact Email text box. This is the email that will be sent child information changes and automated emails to administrators in the system.

Enter the name of the director for the center in the Director Name text box.

If there is an assistant director, office coordinator, area manager, accounts receivable collector or accounts receivable specialist for the center, enter the name of the position in the respective field.


General Information

Center URL

Operating Hours

Licensed Capacity: 0

Available Capacity

Age Range

Center Type: ● Corporate Center ○ Employer Sponsor ○ Franchise Center ○ Developer Center ○ Corporate Owned/Contract Based ○ Home Based

Op Code

Profile

Enter the website address for the center in the Center URL text box. This is the website that parents will be redirected to after clicking on the Logout link from the Connect Portal.

Enter the hours for the center in the Operating Hours text box.

Enter the capacity the center is licensed for in the Licensed Capacity text box.

Enter the total capacity available in the center in the Available Capacity text box.

Enter the age range for children that can attend the center in the Age Range text box.

Select what type of facility the center is in the Center Type section.

- Corporate Center
- Employer Sponsor
- Franchise Center
- Developer Center

- Corporate Owned/Contract Based
- Home Based

If there is an operation code, enter the operation code in the Op Code text box.

Then, enter any profile information for the center in the Profile text box.

If any information has been updated or saved, be sure to select the save button before leaving the screen.

If a new center needs to be created select the clone button. This can only be done by Super Users and will setup a new site under the business level (charges may apply).

Once the clone button has been selected, enter the new site's name and press clone. Logout and login to start the configuration of the new site that has been created.

Home > Hours

Last Modified on 12/04/2018 9:39 am EST

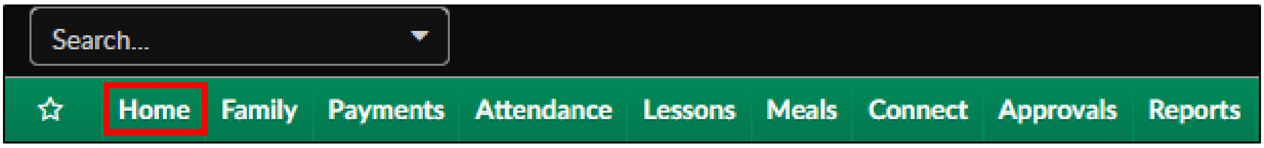
The Hours page allows centers to input their operating hours.

Things to keep in mind regarding hours:

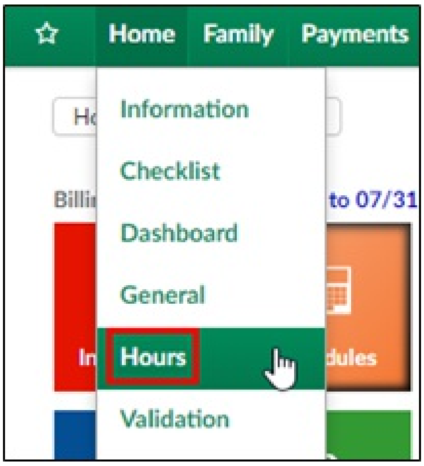
- Hours can be added for the school year and for summer
- Best practice would be to not overlap dates
- Hours need to be setup if you would like the system to charge a late pickup fee

Add Hours

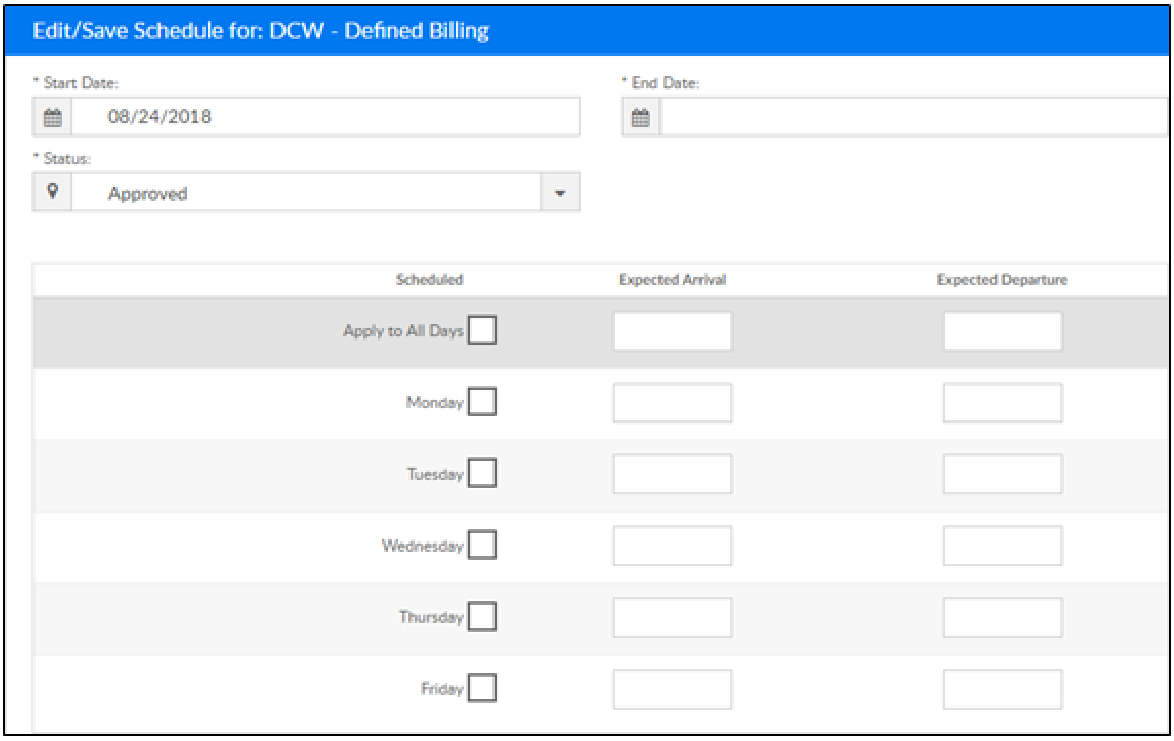
1. Click on the Home option from the navigator bar



2. Select Hours



3. Scroll to the Edit/Save Schedule for:



Edit/Save Schedule for: DCW - Defined Billing

* Start Date: 08/24/2018

* End Date:

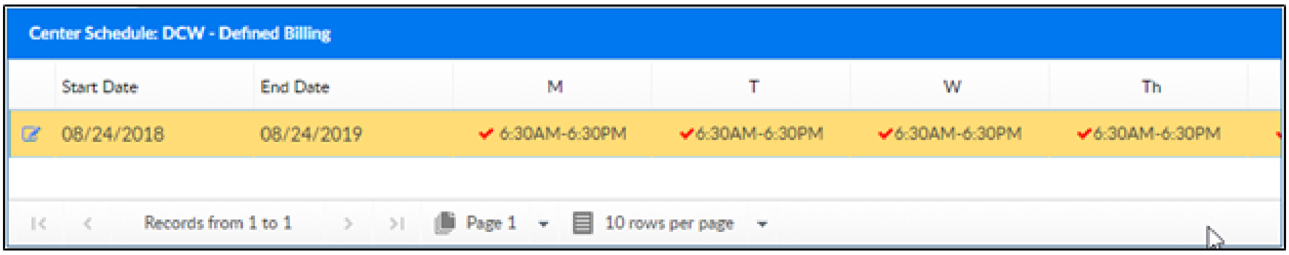
* Status: Approved

Scheduled	Expected Arrival	Expected Departure
Apply to All Days ☐		
Monday ☐		
Tuesday ☐		
Wednesday ☐		
Thursday ☐		
Friday ☐		

- Enter the start date
- Select the end date
- Select a status
  - Approved
  - Closed – No Billing
- Select the days
- Enter the expected arrival and departure times

4. Click Save
5. Verify the new hours are in the Center Schedule:

section at the top



Center Schedule: DCW - Defined Billing

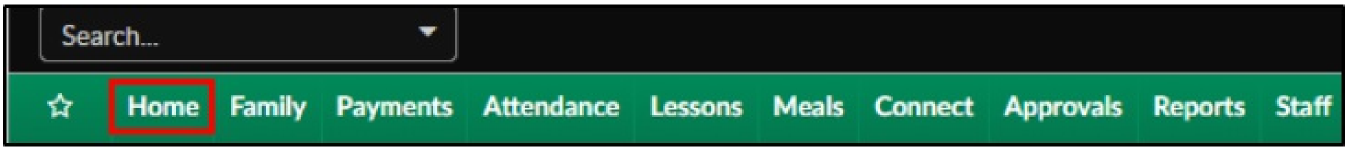
Start Date	End Date	M	T	W	Th
08/24/2018	08/24/2019	✓ 6:30AM-6:30PM	✓6:30AM-6:30PM	✓6:30AM-6:30PM	✓6:30AM-6:30PM

Home > Validation

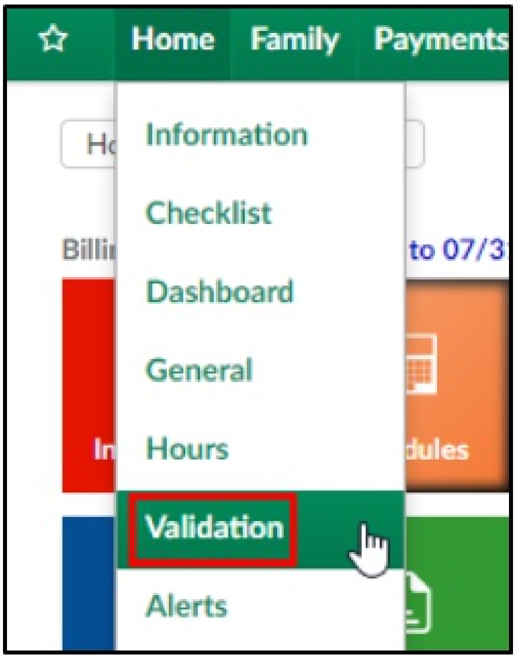
Last Modified on 12/21/2018 3:45 pm EST

Validation allows administrators an easy way to review potential errors related to family records (child, parent, and financials).

1. Click the Home option from the navigator bar



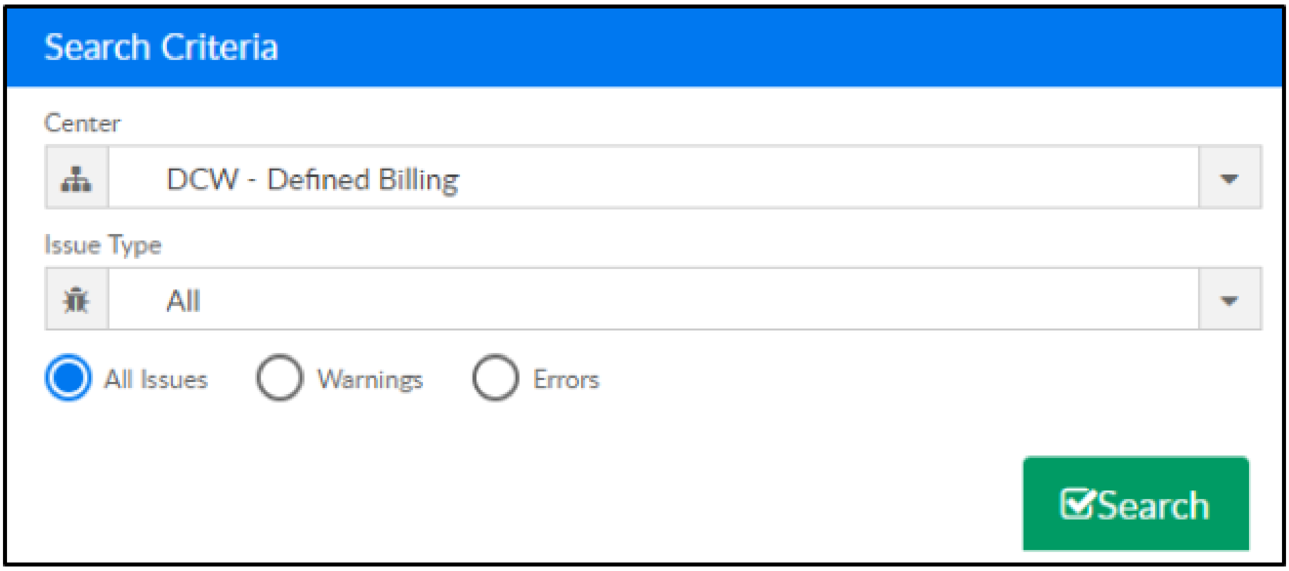
2. Select Validation



3. Click Search Criteria


Showing results for:
Center: DCW - Defined Billing
Issue Type: All
All Issues

4. Complete the Search Criteria popup


Search Criteria

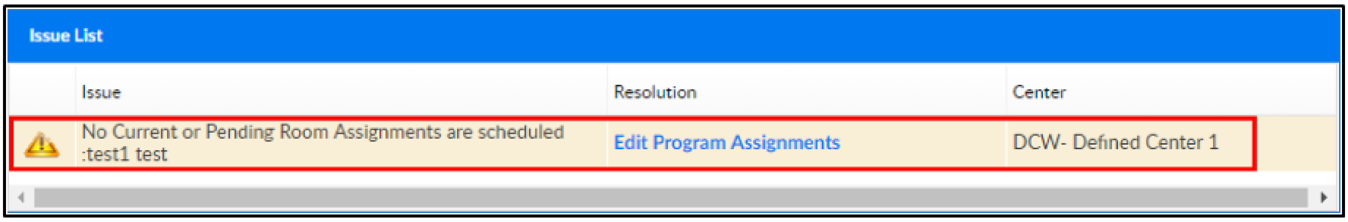
Center: DCW - Defined Billing

Issue Type: All

● All Issues ○ Warnings ○ Errors

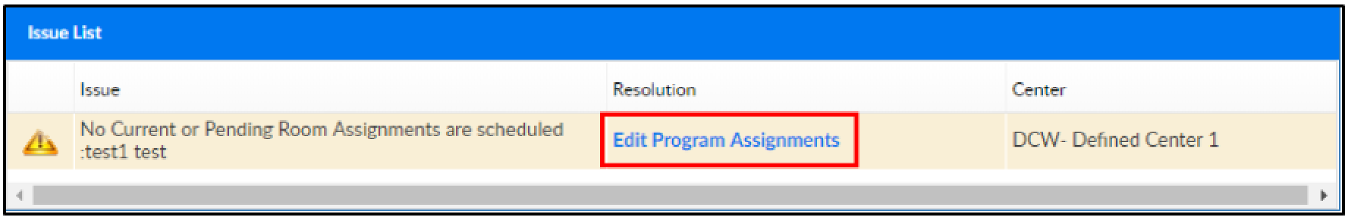
- Center – choose the center from the drop-down
- Issue Type – choose the correct issue type
- All – to view all types of issues
    - Center Configuration Issues
    - Child Tuition Issues
    - Program Assignment Issues
    - Split Family Parent Issues
    - Split Family Sponsor Issues
    - Child Attendance Issues
    - Child Details issues
    - System Issues
- Choose if you would like to view All Issues (Warnings & Errors), just Warnings, or just Errors

5. Click Search
6. Issues will appear in the Issue List section


Issue List

	Issue	Resolution	Center
⚠	No Current or Pending Room Assignments are scheduled :test1 test	Edit Program Assignments	DCW- Defined Center 1

7. There will be a link to the correct screen to reconcile the issue under the Resolution column



	Issue	Resolution	Center
⚠	No Current or Pending Room Assignments are scheduled :test1 test	Edit Program Assignments	DCW- Defined Center 1

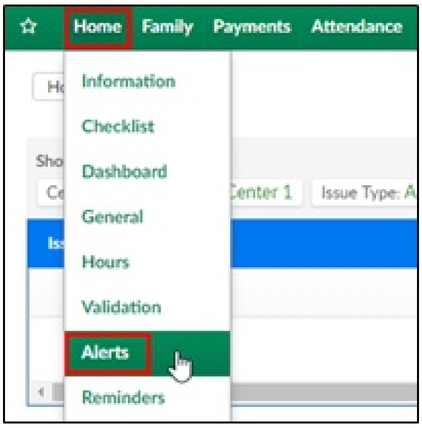
8. Once the issue is corrected, go back into the Validation screen and ensure it is not longer in the Issue List

Home > Alerts

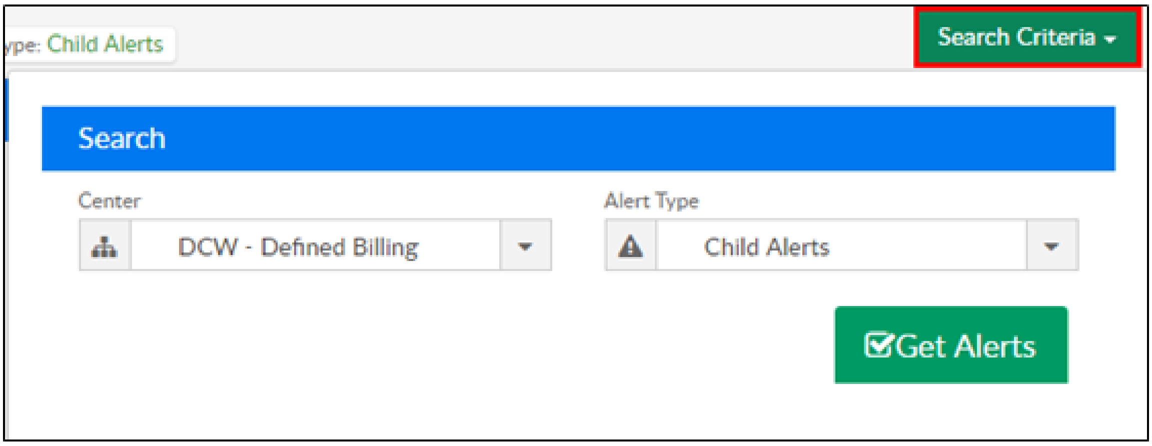
Last Modified on 12/04/2018 9:38 am EST

The Alerts section allows administrators the ability to track alerts for children, parents, staff, and general system information.

1. From the navigator bar, click Home and then select Alerts



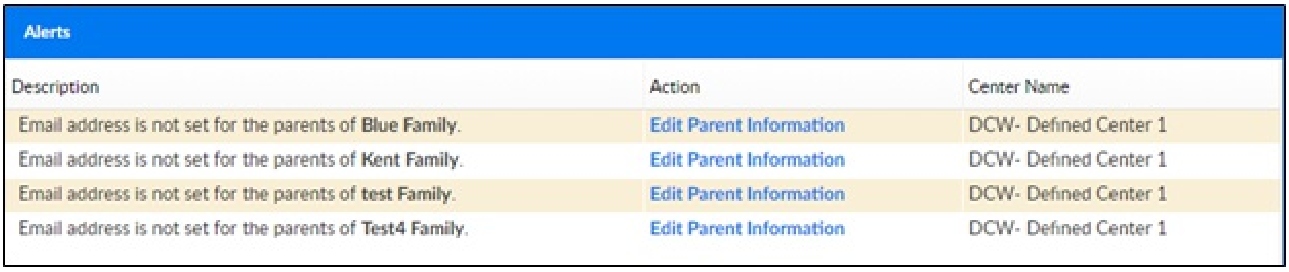
2. Click the Search Criteria drop-down



Center: DCW - Defined Billing

Alert Type: Child Alerts

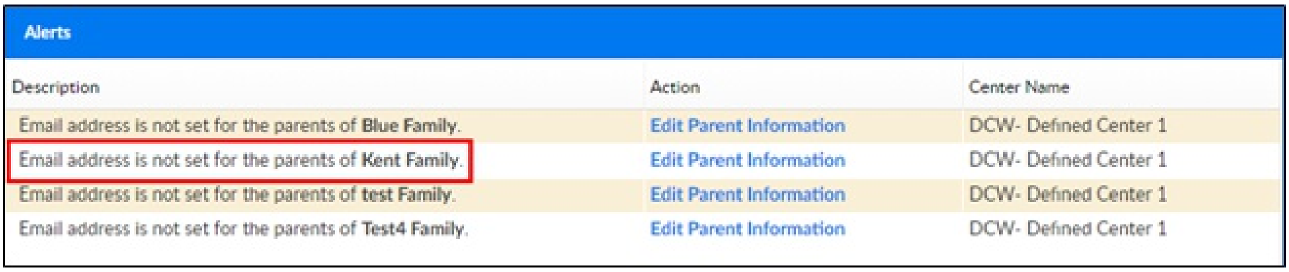
3. Choose the center from the drop-down
4. Select the Alert Type from the drop-down
    - Child Alerts – to view alerts related to a child, including third party contracts
    - Staff Alerts – view alerts for staff and administration
    - Parent Alerts – view alerts related to a parent or financial information for a parent
    - System Alerts – view alerts for the entire center
    - License Alerts – view alerts in regard to licensing
5. Click Get Alerts
6. The alerts will show in the Alerts section



Alerts

Description	Action	Center Name
Email address is not set for the parents of **Blue Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **Kent Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **test Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **Test4 Family**.	Edit Parent Information	DCW- Defined Center 1

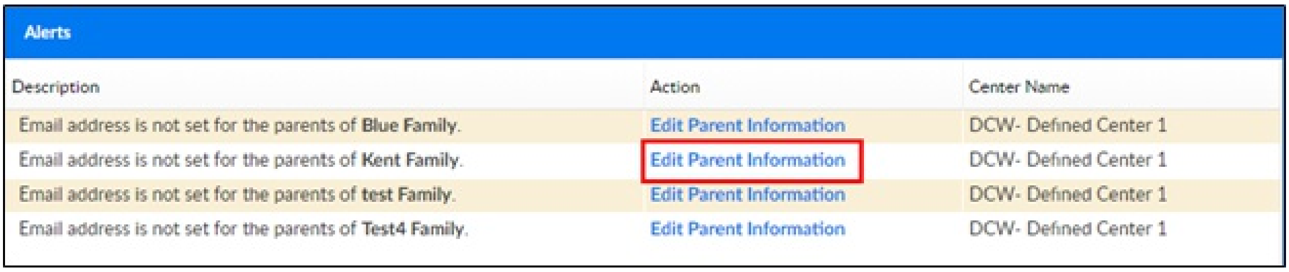
7. The Description column describes what needs to be changed. In this example, an email address needs to be set for the parents of the Kent family



Alerts

Description	Action	Center Name
Email address is not set for the parents of **Blue Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **Kent Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **test Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **Test4 Family**.	Edit Parent Information	DCW- Defined Center 1

8. The Action column is a link to where the issue can be fixed. In this case, the issue can be resolved in the Parent Information screen. Click the link to edit the email address



Alerts

Description	Action	Center Name
Email address is not set for the parents of **Blue Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **Kent Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **test Family**.	Edit Parent Information	DCW- Defined Center 1
Email address is not set for the parents of **Test4 Family**.	Edit Parent Information	DCW- Defined Center 1

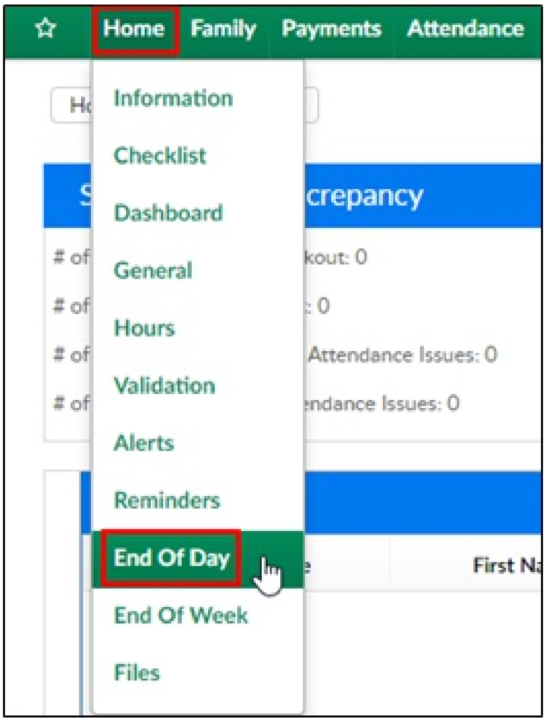
9. Once the issue is fixed, go back into the Alerts screen and ensure the alert has been removed. In this example, an email address was added to the Kent family profile and the alert is gone

Home > End of Day

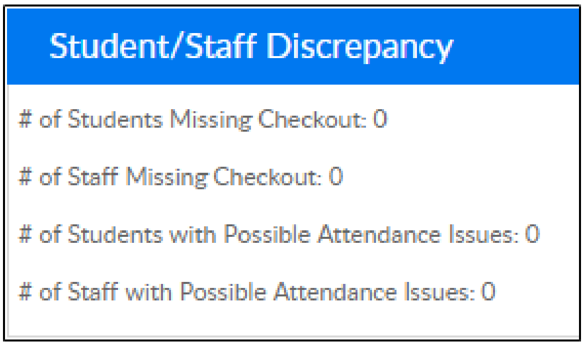
Last Modified on 12/04/2018 9:36 am EST

The End of Day screen allows administrators the ability to see any discrepancies at the end of the day – including staff or students missing checkout, attendance issues, and in process deposits.

1. From the navigator bar, click Home, then select End of Day



2. Review each section
    - Student/Staff Discrepancy – this will show the number or missing students and staff and possible attendance issues



Student/Staff Discrepancy

# of Students Missing Checkout: 0

# of Staff Missing Checkout: 0

# of Students with Possible Attendance Issues: 0

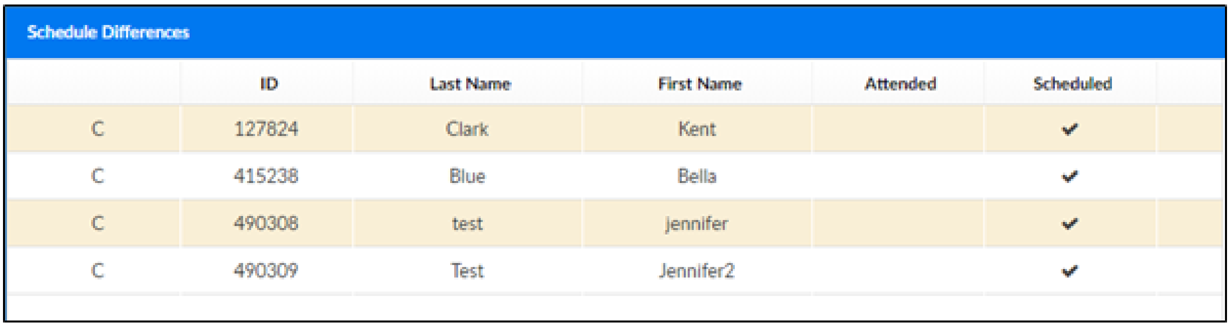
# of Staff with Possible Attendance Issues: 0

    - Missing Check Out – any student or staff not checked out for the day will appear in this list
        - To check a student or staff out, go to the Attendance>Entry screen

Missing Check Out

Last Name	First Name	In Time	Out Time	Center	Classro

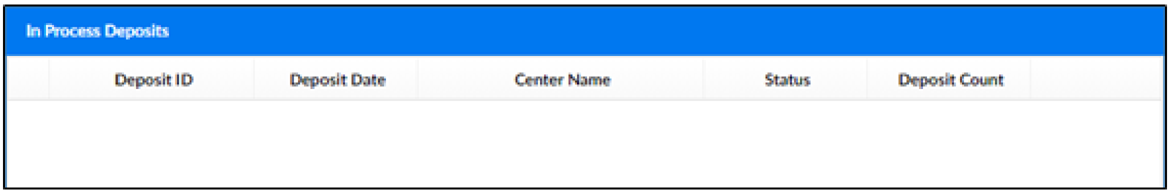
- Schedule Differences – this list will display if a student attended a program and was not scheduled or was scheduled and did not attend



Schedule Differences

	ID	Last Name	First Name	Attended	Scheduled
C	127824	Clark	Kent		✓
C	415238	Blue	Bella		✓
C	490308	test	jennifer		✓
C	490309	Test	Jennifer2		✓

- In Process Deposits – if a deposit batch is open and has not been posted, it will display here
  - To post a deposit batch, go to Payment>Deposit



In Process Deposits

Deposit ID	Deposit Date	Center Name	Status	Deposit Count

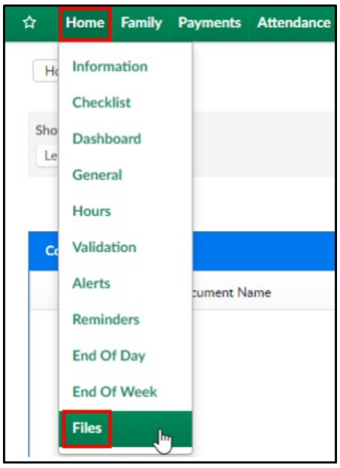
Home > Files

Last Modified on 12/21/2018 3:51 pm EST

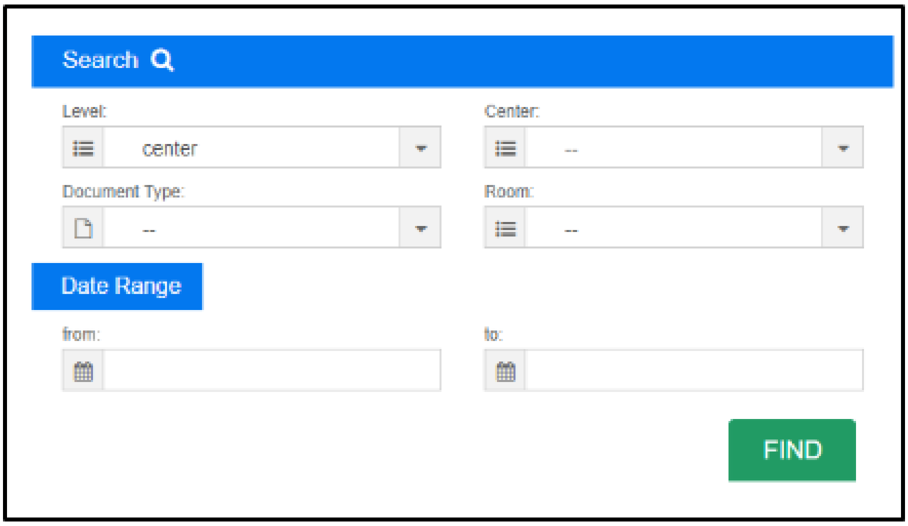
This area allows administrators the ability to view documents that have been uploaded for children at the business level.

To access the Files screen, follow the steps below:

1. Click Home from the navigator bar, then click Files



2. Click the Search Criteria drop-down
3. Enter the necessary information



Level: center

Center: --

Document Type: --

Room: --

from:

to:

- Choose the Level
    - Center – search documents uploaded for a center
    - Child – search documents uploaded for children
- Center – select the business level or a center
- Document Type – select a document type if applicable
- Room – choose the room

    - From/To – enter the date range you wish to search

4. Click Find
5. To view the document press the green square, this will open the document

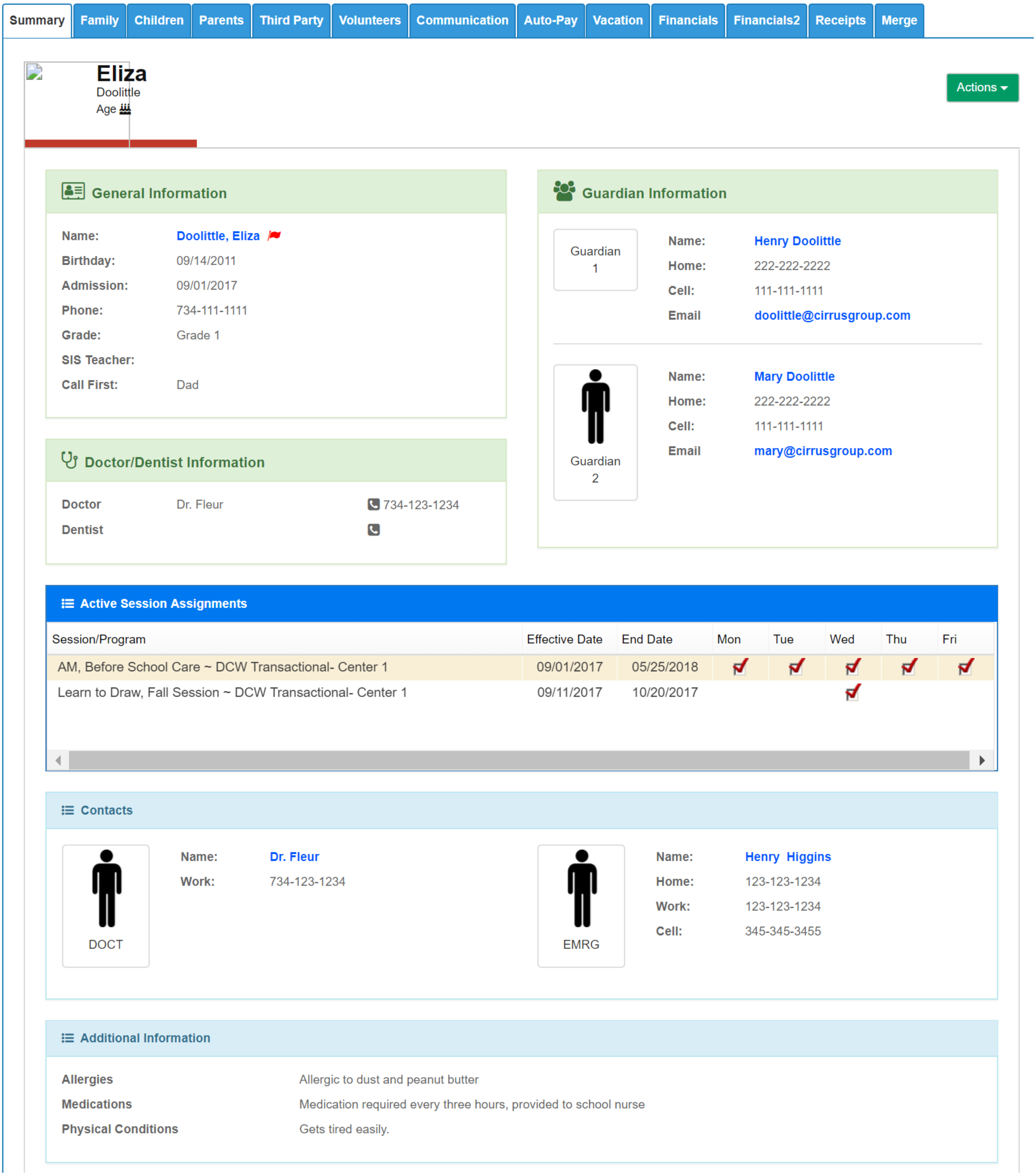
---

Family Record, Summary Tab

Last Modified on 10/10/2017 12:37 pm EDT

The summary tab on the family record displays basic information about a child, including child detail- doctor, dentist, basic health information, program/room assignments, parent and contact information.   This detail can be exported from the summary page by selecting the Actions menu.

Each child will have their own summary page. Select the child's name to change views.



Eliza
Doolittle
Age

General Information

Name:	Doolittle, Eliza
Birthday:	09/14/2011
Admission:	09/01/2017
Phone:	734-111-1111
Grade:	Grade 1
SIS Teacher:	
Call First:	Dad

Doctor/Dentist Information

Doctor	Dr. Fleur	☎ 734-123-1234
Dentist		☎

Guardian Information

Guardian 1

Name:	Henry Doolittle
Home:	222-222-2222
Cell:	111-111-1111
Email	doolittle@cirrusgroup.com

Guardian 2

Name:	Mary Doolittle
Home:	222-222-2222
Cell:	111-111-1111
Email	mary@cirrusgroup.com

Active Session Assignments

Session/Program	Effective Date	End Date	Mon	Tue	Wed	Thu	Fri
AM, Before School Care ~ DCW Transactional- Center 1	09/01/2017	05/25/2018	✓	✓	✓	✓	✓
Learn to Draw, Fall Session ~ DCW Transactional- Center 1	09/11/2017	10/20/2017			✓		

Contacts

DOCT

Name:	Dr. Fleur
Work:	734-123-1234

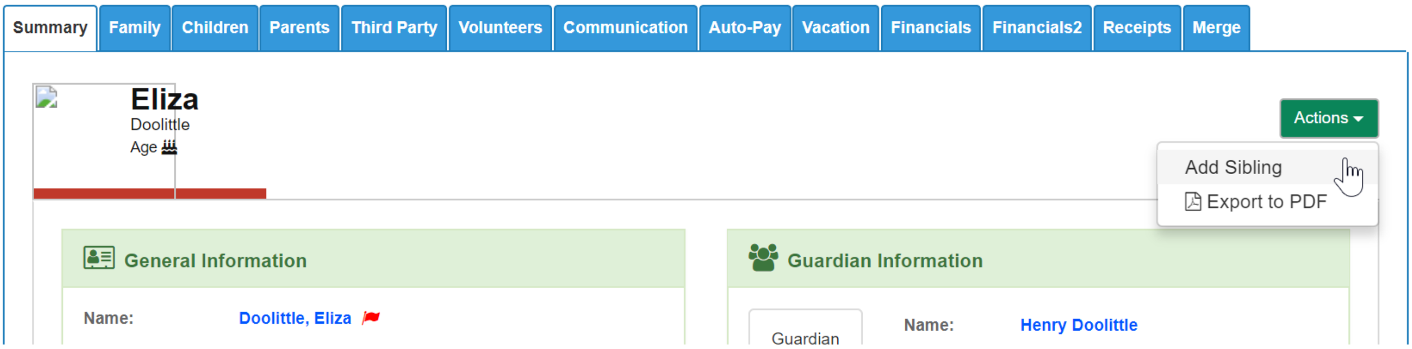
EMRG

Name:	Henry Higgins
Home:	123-123-1234
Work:	123-123-1234
Cell:	345-345-3455

Additional Information

Allergies	Allergic to dust and peanut butter
Medications	Medication required every three hours, provided to school nurse
Physical Conditions	Gets tired easily.

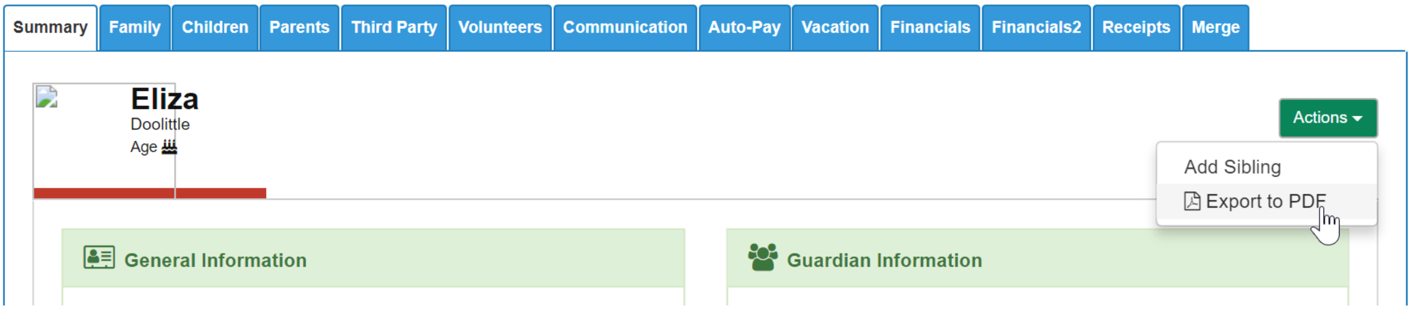
If another child needs to be added to the family select the Add Sibling option. This will open a blank Child record page- click here to see how an admin can add in a sibling.



Name: Doolittle, Eliza

Name: Henry Doolittle

From the Actions menu select Export to PDF, this will open a branded summary page for each child.



Family Record, Family Tab

Last Modified on 12/19/2018 3:33 pm EST

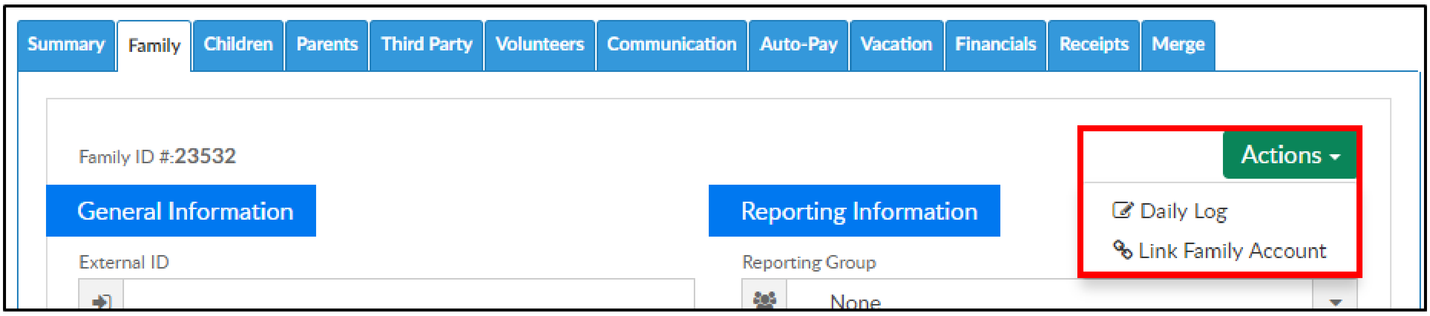
The Family Tab within the Family Record displays basic family information and allows administrators the ability to add reporting groups, track family status and basic settings.

Please Note: After updating anything on this screen, be sure to save before moving on!

Family ID - the first line of the Family Tab displays the Family ID number. This is the system's unique ID for the family.

Actions Menu!

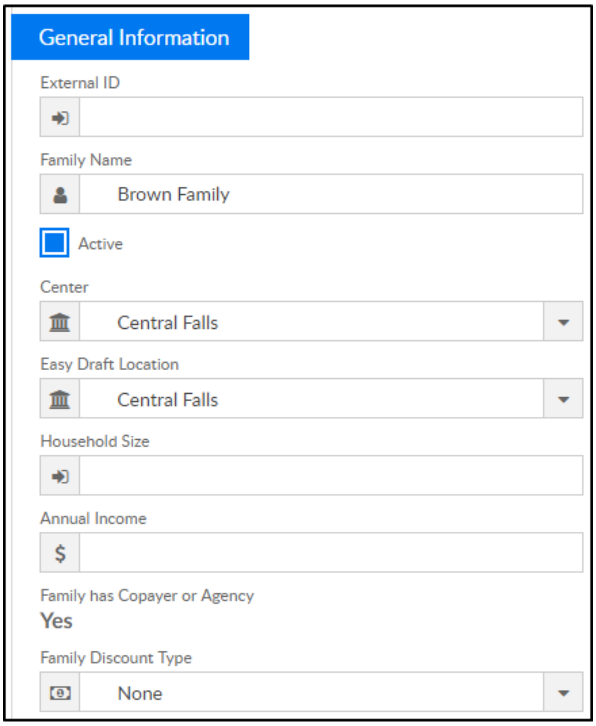
Click the actions menu to add an entry to the daily log or to link existing family accounts .



General Information

- External ID - this field will display if the center uses an SIS integration or imported family detail
- Family Name - the system will automatically create the family name using the last name of the student and "Family". This can be changed if the student and parents have a different last name
- Active - this box should be checked if the family is still active at the center. If the family is inactive, uncheck the box
- Center - select the family's home center. This should be the center the students typically attend
- Easy Draft Location
- Household Size - can be used of the site tracks the information for agency or CACFP purposes

- Annual Income - can be used of the site tracks the information for agency or CACFP purposes
- Family has Copayer or Agency
    - Yes - the family is a split family and has a third party contract associated to one or more students
    - No - the family is not a split family and does not have a contract
- Family Discount Type - used for tracking purposes. **Please Note:** this will not actually allocate a discount to the family (that is done on the child or parent tab) options are Employee or Family



General Information

External ID

Family Name: Brown Family

☑ Active

Center: Central Falls

Easy Draft Location: Central Falls

Household Size

Annual Income: $

Family has Copayer or Agency: Yes

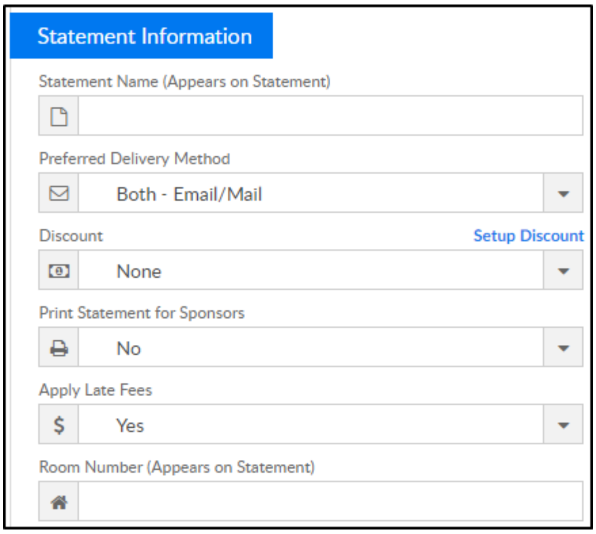
Family Discount Type: None

Statement Information

- Statement Name - enter the name to display on the family's financial ledger. If this text box is blank, the statement name will be defaulted to the Family Name
- Preferred Delivery Method
    - Both - Email/Mail - the statement will be emailed and mailed
    - Email - the statement will be delivered via email only
    - Printed Mail - the statement will be delivered via mail only
- Discount - using this drop-down list to assign a corporate discount for a family is not recommended; the preferred discount method for a family is a corporate

discount setup in the parent tab

- Print Statements for Sponsors - this field will display if third party sponsors will have a billing statement created for the student
  - Yes - print a statement for the sponsor
  - No - do not print a statement for the sponsor
- Apply Late Fees
  - Yes - automatically assign late fees to the family as needed
  - No - do not apply late fees to the family
- Room Number (Appears on Statement) - enter the room number associated to the student's enrollment into the center



Statement Name (Appears on Statement):

Preferred Delivery Method: Both - Email/Mail

Discount: None

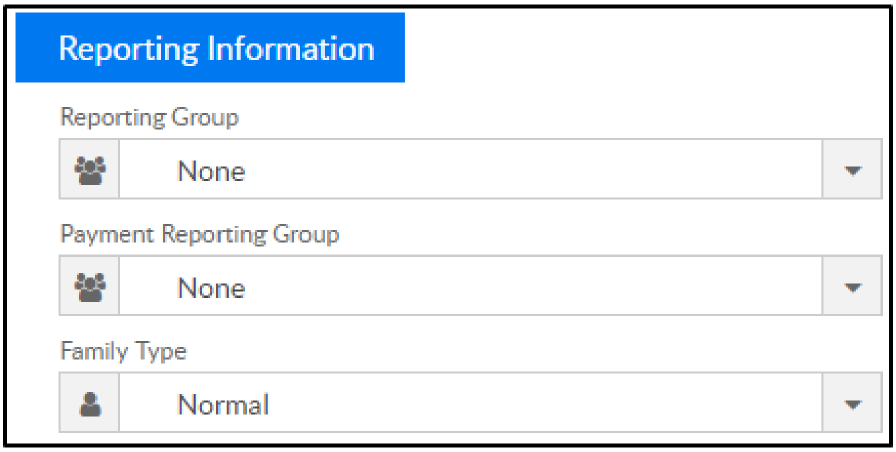
Print Statement for Sponsors: No

Apply Late Fees: Yes

Room Number (Appears on Statement):

Reporting Information

- Reporting Group - select from the list to associate a family to a specific reporting group. **Please Note**: This is a group that can be associated to a discount
- Payment Reporting Group -
- Family Type -



Reporting Information

Reporting Group: None

Payment Reporting Group: None

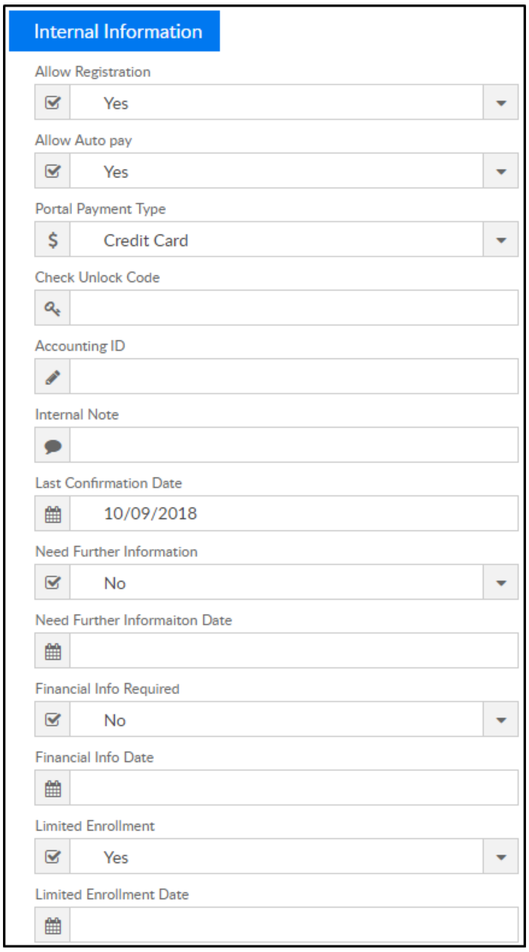
Family Type: Normal

Internal Information

- Allow Registration
  - Yes - the family is able to register for a classroom online through the Connect Portal
  - No - the family is not able to register online via the connect portal
- Allow Auto Pay
  - Yes - allow the family to setup auto pay
  - No - the family is not allow to use auto pay
- Portal Payment Type - choose from the drop-down to indicate the method of payment available for the parents to make thought the Connect Portal. If anything other than Credit Card is selected, parents will be able to register for programs online without being required to make a payment
- Check Unlock Code - this field displays a code required by the parent to make a payment online with a check
- Accounting ID - this field displays the accounting identification number associated to the family
- Internal Note - enter any additional notes regarding the family in the Platform
- Last Confirmation Date - the date the family last updated their information online
- Need Further Information
  - Yes - the family needs to provide more information
  - No - the family does not need to provide any more information
- Need Further Information Date - select a date to indicate when further

information is needed from the family

- Financial Info Required
    - Yes - third party financial information is needed
    - No - no financial information is needed
- Financial Info Date - this field indicates when the Financial Info Required section was created
- Limited Enrollment
    - Yes - the family is waiting because of limited enrollment
    - No - the family is not waiting
- Limited Enrollment Date - indicated when the limited enrollment section was created



Internal Information

Allow Registration: Yes

Allow Auto pay: Yes

Portal Payment Type: Credit Card

Check Unlock Code:

Accounting ID:

Internal Note:

Last Confirmation Date: 10/09/2018

Need Further Information: No

Need Further Informaiton Date:

Financial Info Required: No

Financial Info Date:

Limited Enrollment: Yes

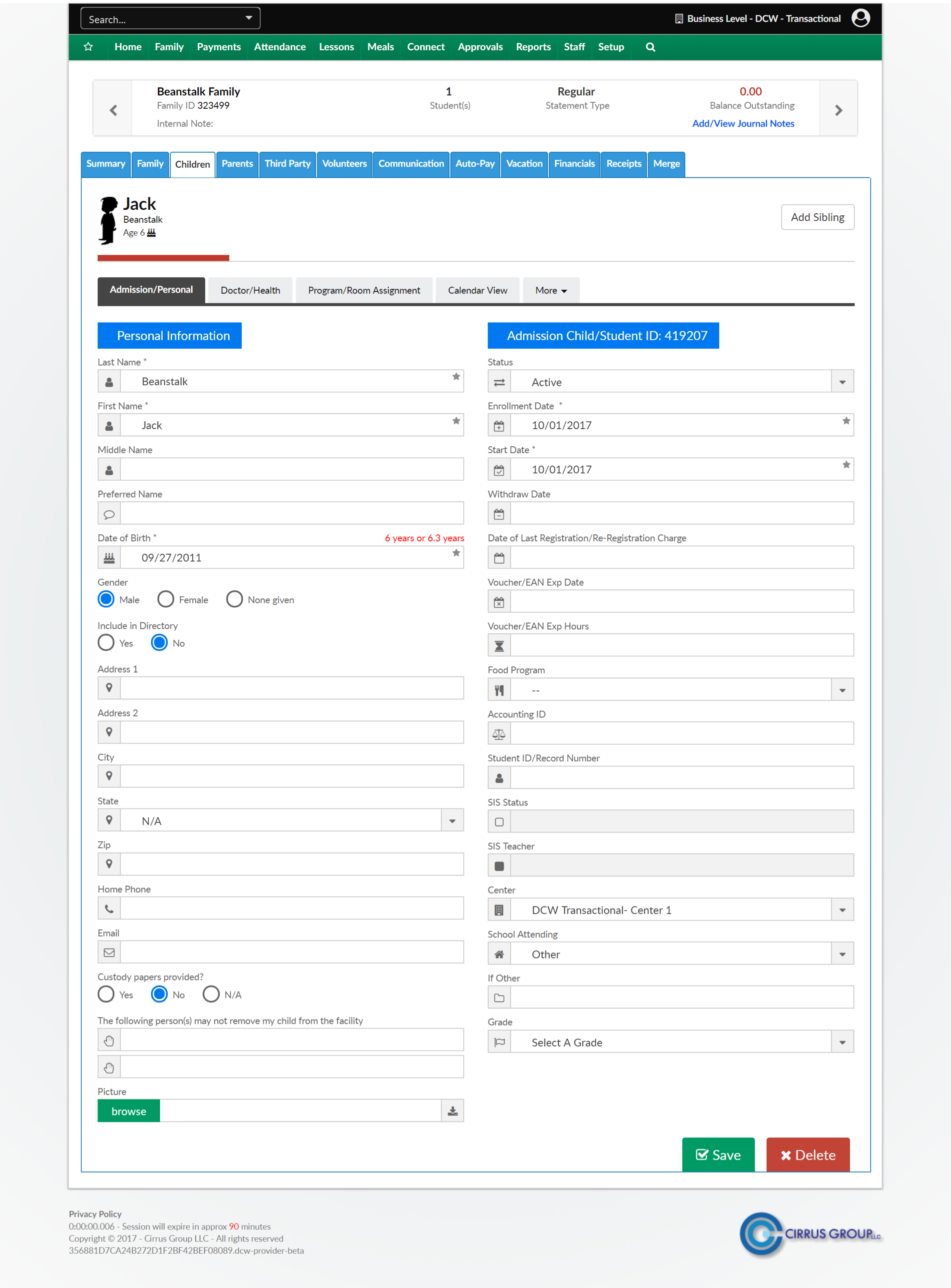
Limited Enrollment Date:

When all information is complete, click Save at the bottom of the page.

Family Record, Child Tab-Admission/Personal

Last Modified on 06/29/2018 4:00 pm EDT

When navigating to a child's record, the first tab that will display by default is the Admission/Personal Information tab. On this screen the only detail that is required are the fields marked with *.



Beanstalk Family
Family ID 323499
Internal Note:

1 Student(s)

Regular Statement Type

0.00 Balance Outstanding

Add/View Journal Notes

Jack
Beanstalk
Age 6

Personal Information

Last Name *: Beanstalk

First Name *: Jack

Middle Name:

Preferred Name:

Date of Birth *: 09/27/2011 — 6 years or 6.3 years

Gender: ● Male ○ Female ○ None given

Include in Directory: ○ Yes ● No

Address 1:

Address 2:

City:

State: N/A

Zip:

Home Phone:

Email:

Custody papers provided? ○ Yes ● No ○ N/A

The following person(s) may not remove my child from the facility:

Picture:

Admission Child/Student ID: 419207

Status: Active

Enrollment Date *: 10/01/2017

Start Date *: 10/01/2017

Withdraw Date:

Date of Last Registration/Re-Registration Charge:

Voucher/EAN Exp Date:

Voucher/EAN Exp Hours:

Food Program: --

Accounting ID:

Student ID/Record Number:

SIS Status:

SIS Teacher:

Center: DCW Transactional- Center 1

School Attending: Other

If Other:

Grade: Select A Grade

Privacy Policy
0:00:00.006 - Session will expire in approx 90 minutes
Copyright © 2017 - Cirrus Group LLC - All rights reserved
356881D7CA24B272D1F2BF42BEF08089.dcw-provider-beta

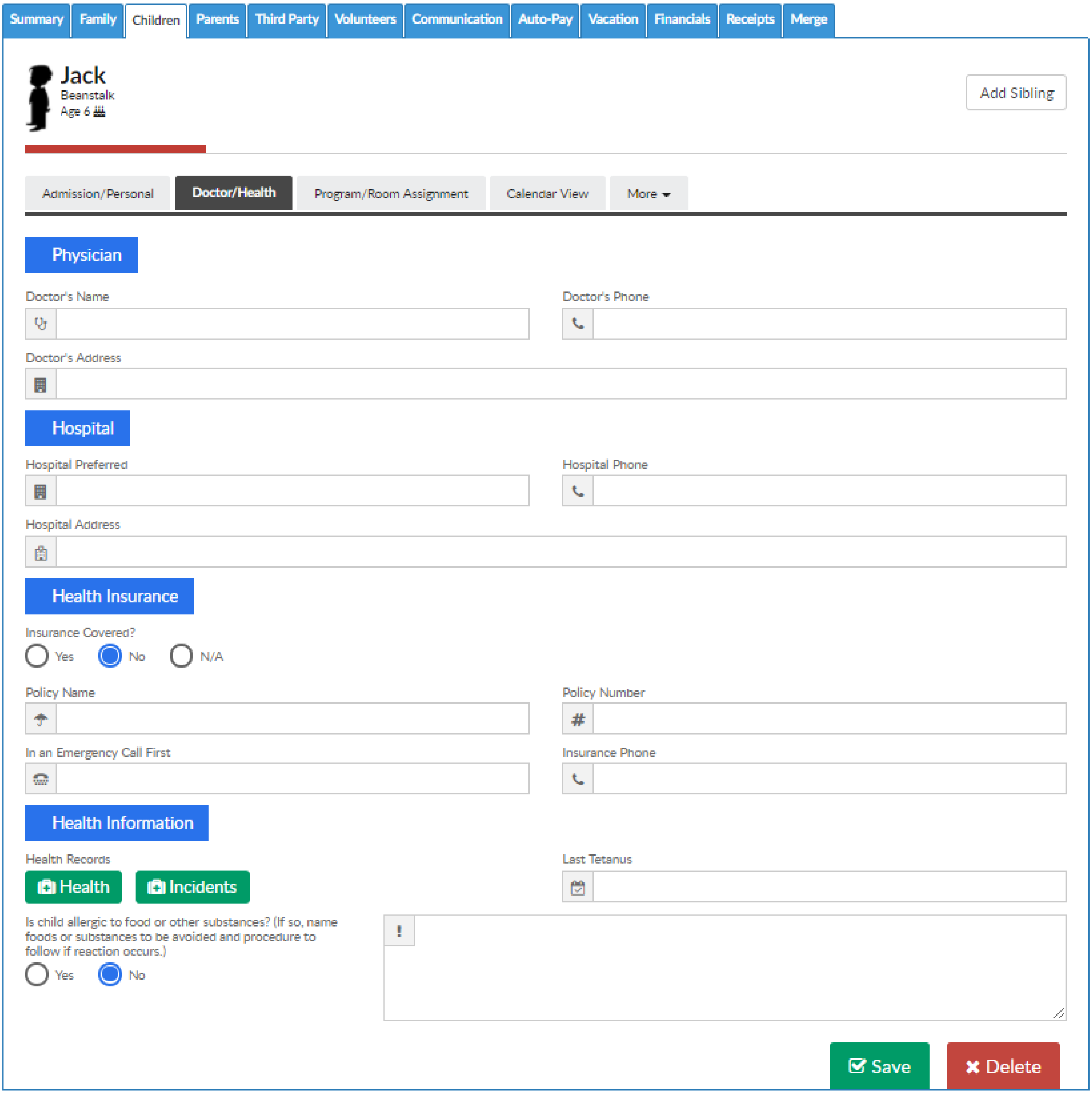
- Personal Information
    - Last Name*- Last name of the child
    - First Name*- First name of the child
    - Middle Name- Middle name of the child
    - Preferred Name- Nickname of the child
    - Date of Birth- Child's birthday
    - Gender- Child's gender
    - Include in Directory- by default this will be set to No once the child is saved- to include the child in a site-wide directory select Yes.
    - Address 1- First line of the child's address
    - Address 2- Second line of the child's address
    - City - Child's city
    - State - Child's state
    - Zip- Child's zip code/postal code
    - Home Phone- Child's home phone number
    - Email- (the main contact email)
    - Custody Papers Provided- Have custody papers been given to the center. If they have the documents can be uploaded to the child's record (momore > documents)
    - Do Not Remove fields- Names of people that are unable to pickup the child
    - Picture- The child's photo
    - Status- If the child is active, inactive, pending or withdrawn
    - Enrollment Date- Date the child enrolled in programs
    - Start Date- Date the child will be starting programs (this date does not change to match program/room assignment start dates)
    - Withdraw Date- Date the child left the center
    - Date of Last Registration/Reregistration- Last date of registration
    - Voucher/EAN Date
    - Voucher/EAN Hours
    - Food Program- If the child participates in the CACFP program, this field can display if the child is free, paid or reduced

  - Accounting ID
  - Student ID/Record Number
  - SIS Status
  - SIS Teacher
  - Center- Center the child is attending
  - School Attending- Center the child is attending
  - If Other
  - Grade- Grade level of the child

Family Record, Child Tab-Doctor/Health

Last Modified on 03/14/2018 9:17 am EDT

From the child record, select the Doctor/Health tab. This screen will display basic Doctor/Health detail for the selected child. If any changes are made on this page, be sure to press Save before continuing to the next section! If the Delete button is selected, this child will be deleted.



Jack
Beanstalk
Age 6

Physician

Doctor's Name

Doctor's Phone

Doctor's Address

Hospital

Hospital Preferred

Hospital Phone

Hospital Address

Health Insurance

Insurance Covered?
○ Yes ● No ○ N/A

Policy Name

Policy Number

In an Emergency Call First

Insurance Phone

Health Information

Health Records

Last Tetanus

Is child allergic to food or other substances? (If so, name foods or substances to be avoided and procedure to follow if reaction occurs.)
○ Yes ● No

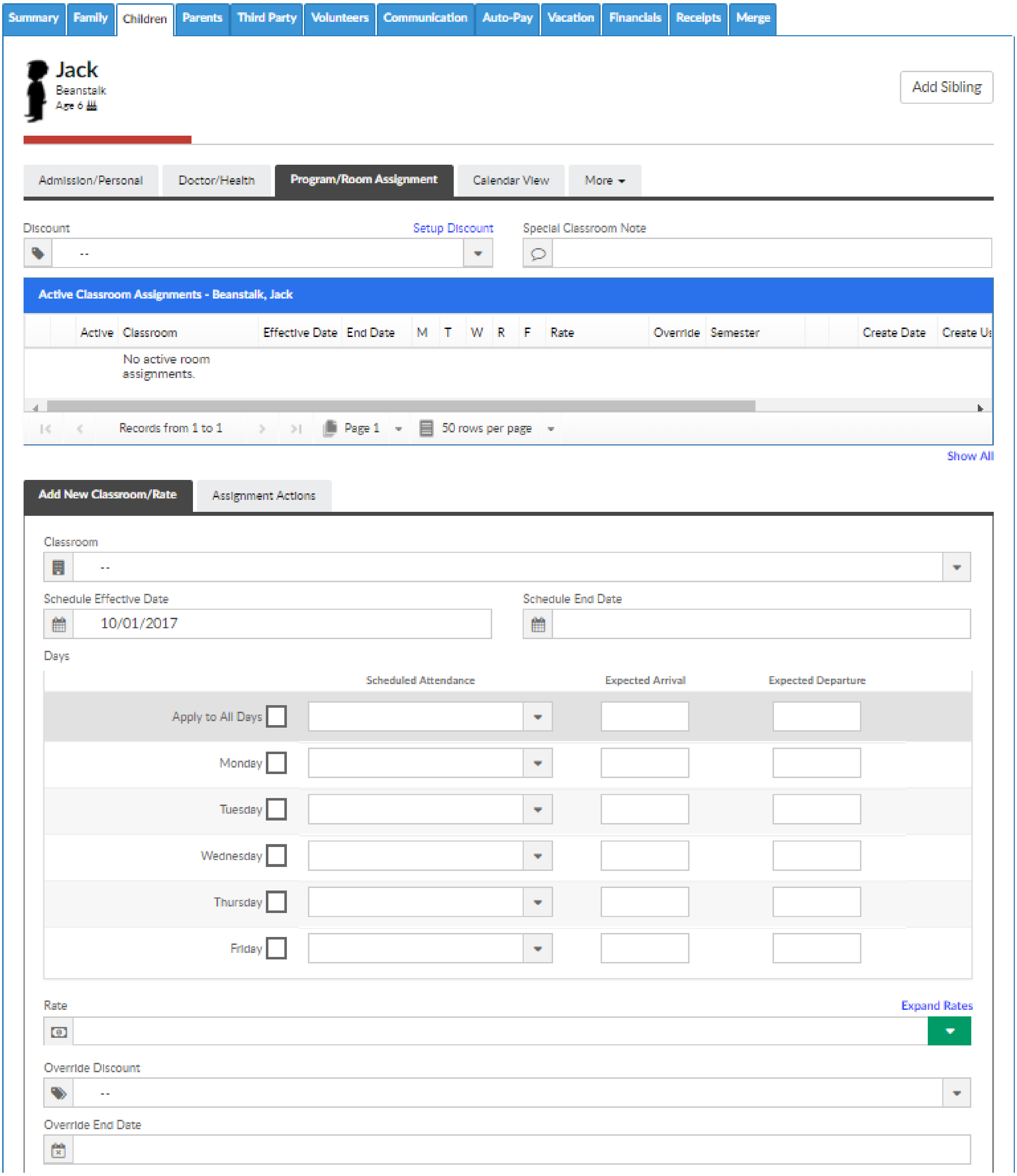
Available fields are below-

- Doctor's Name
- Doctor's Phone
- Doctor's Address
- Hospital Preferred
- Hospital Phone
- Hospital Address
- Insurance Covered
    - Yes
    - No
    - N/A
- Policy Name
- Policy Number
- In an Emergency Call First
- Insurance Phone
- Health Records- Health Button- this will link to the More > Health section of the child record
- Health Records- Incident Button - this will link to the More > Incident section of the child record
- Last Tetanus
- Child Allergies

Family Record, Child Tab- Program/Room Assignment

Last Modified on 04/03/2018 8:10 am EDT

The Program/Room assignment tab displays a student's scheduled classrooms, events or programs. Once on the family record, select the Children tab, then select the Program/Room Assignment tab. As a default only current or future schedules will display. Select the Show All link to display program/room assignments that have ended.



Jack
Beanstalk
Age 6

Discount: --

Special Classroom Note:

No active room assignments.

Classroom: --

Schedule Effective Date: 10/01/2017

Schedule End Date:

Days

Apply to All Days ☐
Monday ☐
Tuesday ☐
Wednesday ☐
Thursday ☐
Friday ☐

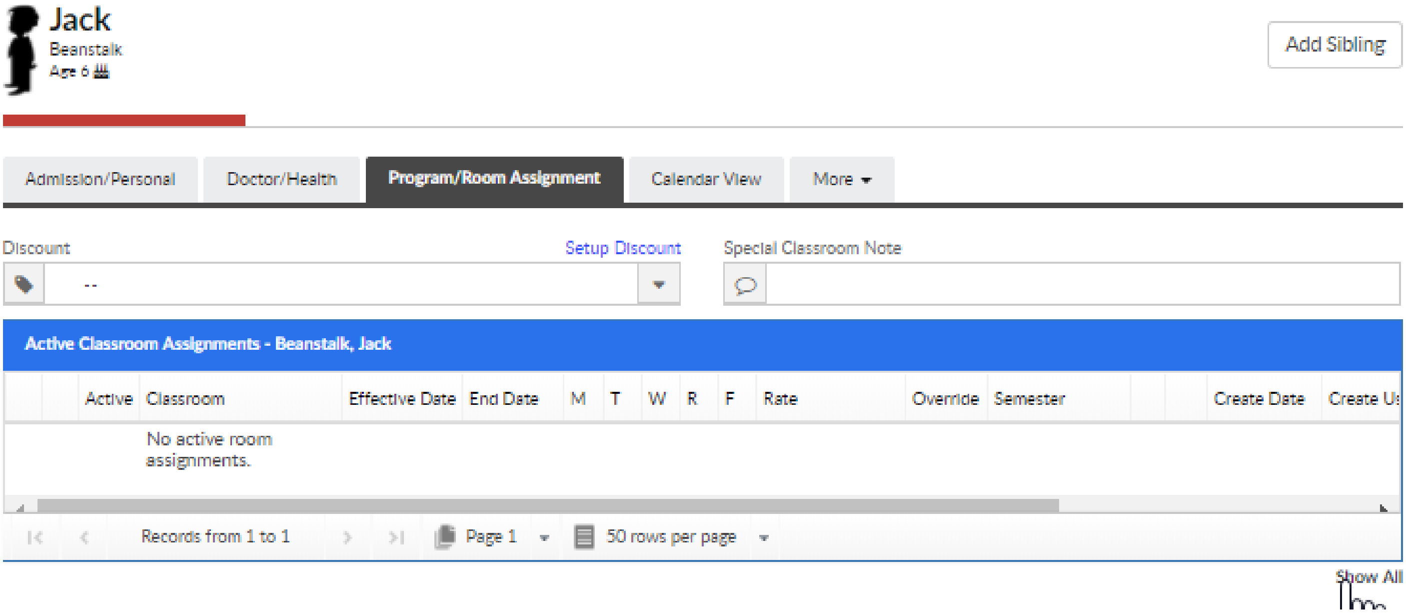
Rate:

Override Discount: --

Override End Date:

On this screen, child specific discounts can be added. From the Discount drop down menu select the discount that should be applied.

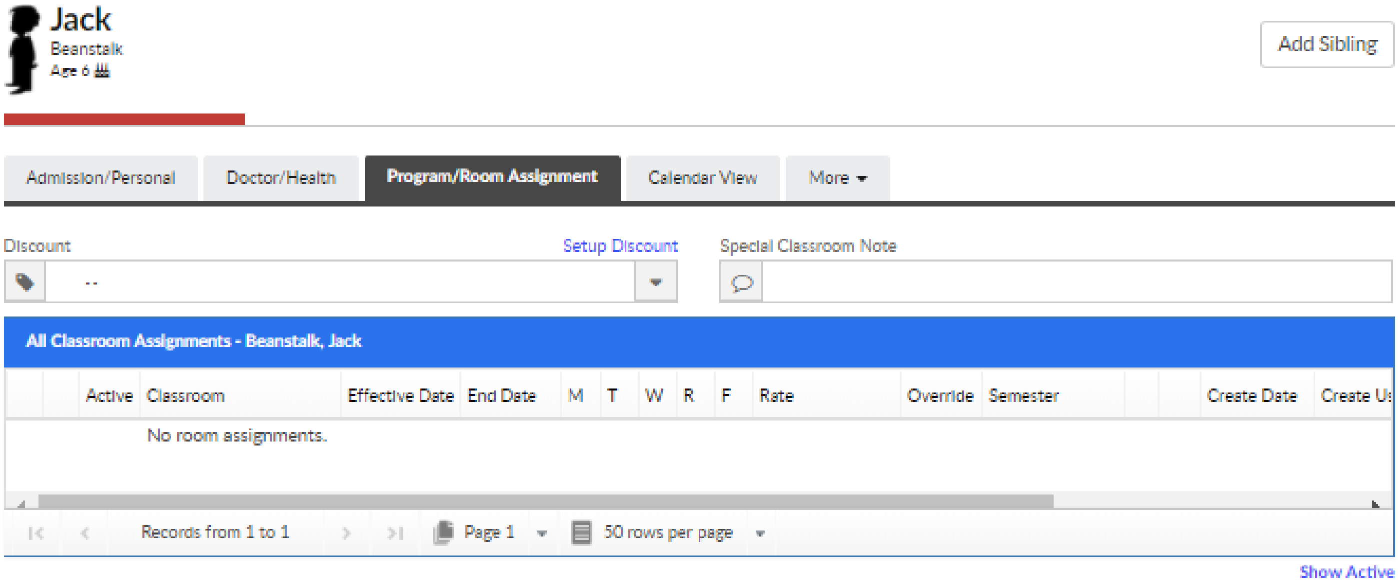
If a special classroom note should apply for the child (will display for all room/program assignments) enter a note in the Special Classroom Note field.



Active Classroom Assignments - Beanstalk, Jack

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester		Create Date	Create U
			No active room assignments.													

If the Show All button is selected, the label of the Classroom Assignments box will toggle to All Classroom Assignments, select the Show Active button to return to the active only view.



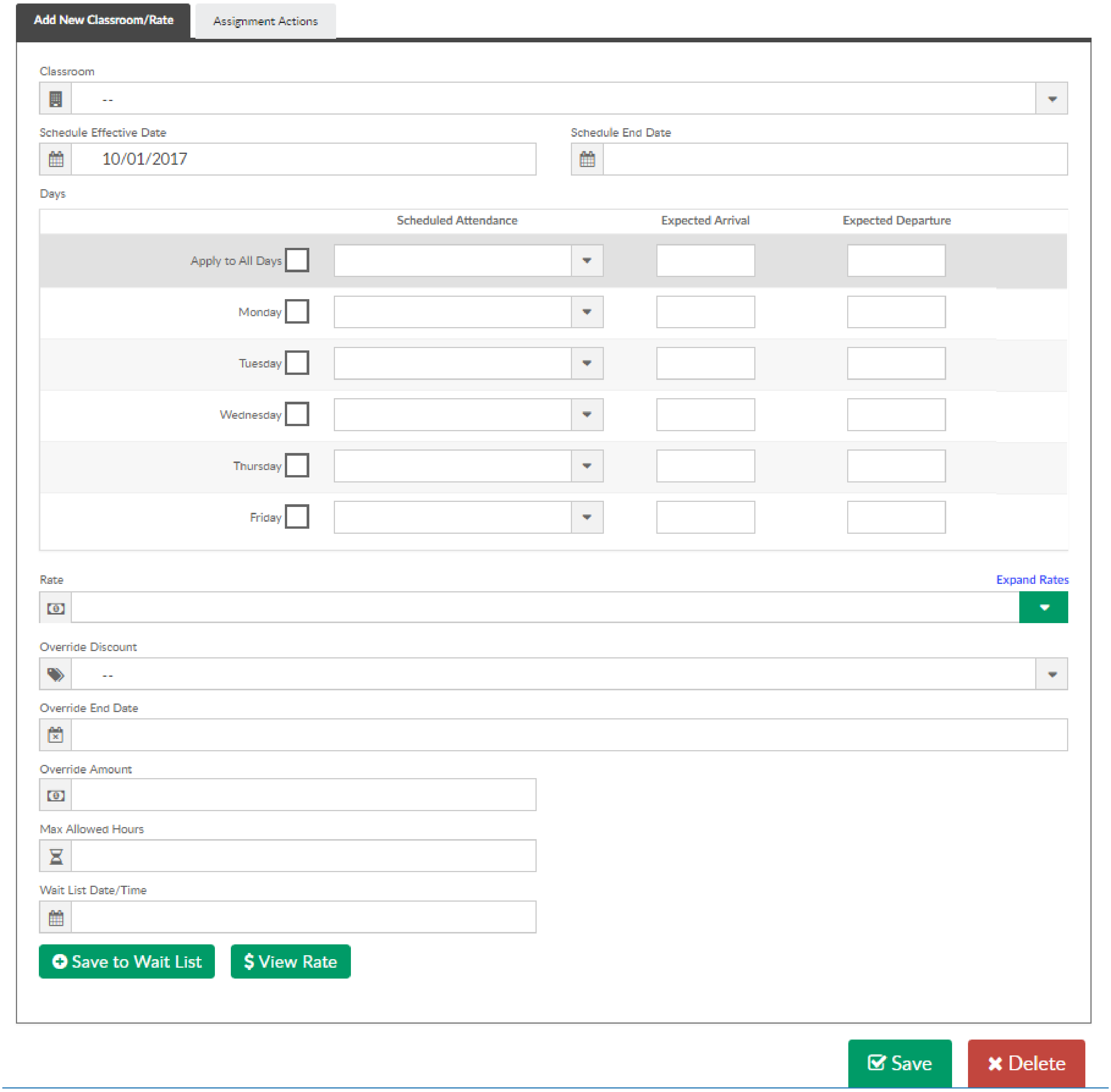
All Classroom Assignments - Beanstalk, Jack

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester		Create Date	Create U
			No room assignments.													

To add a new Program/Room assignment to a child, scroll to the Add New Classroom/Rate section and enter the below detail -

- Classroom (required)
- Semester (if applicable)
- Schedule Effective Date (start date)
- Schedule End Date (end date)
- Days
    - Days of the week the child will be scheduled

  - Scheduled Attendance (AM, AM/PM, PM, Full Day)
  - Expected Arrival (start time)
  - Expected Departure (end time)
- Rate
- Override Discount (if a discretionary discount has been setup)
- Override End Date (if using a discretionary discount)
- Override Amount (amount to charge for program/room assignment)
- Max Allowed Hours
- Wait List Date/Time- day and time the child should be added to the wait list as of
- Save to Wait List- add child to wait list for selected program/room assignment- this will not add an active schedule for the child.
  - The child will display on the Wait List tab on the home screen- waiting for approval. To use this feature the Add to Wait List option on the room setup screen must be set to YES.
- View Rate will allow for a preview of the selected rate for the number of days scheduled. If a discount has been added the discounted amount will also display.



Classroom: --

Schedule Effective Date: 10/01/2017

Schedule End Date:

Override Discount: --

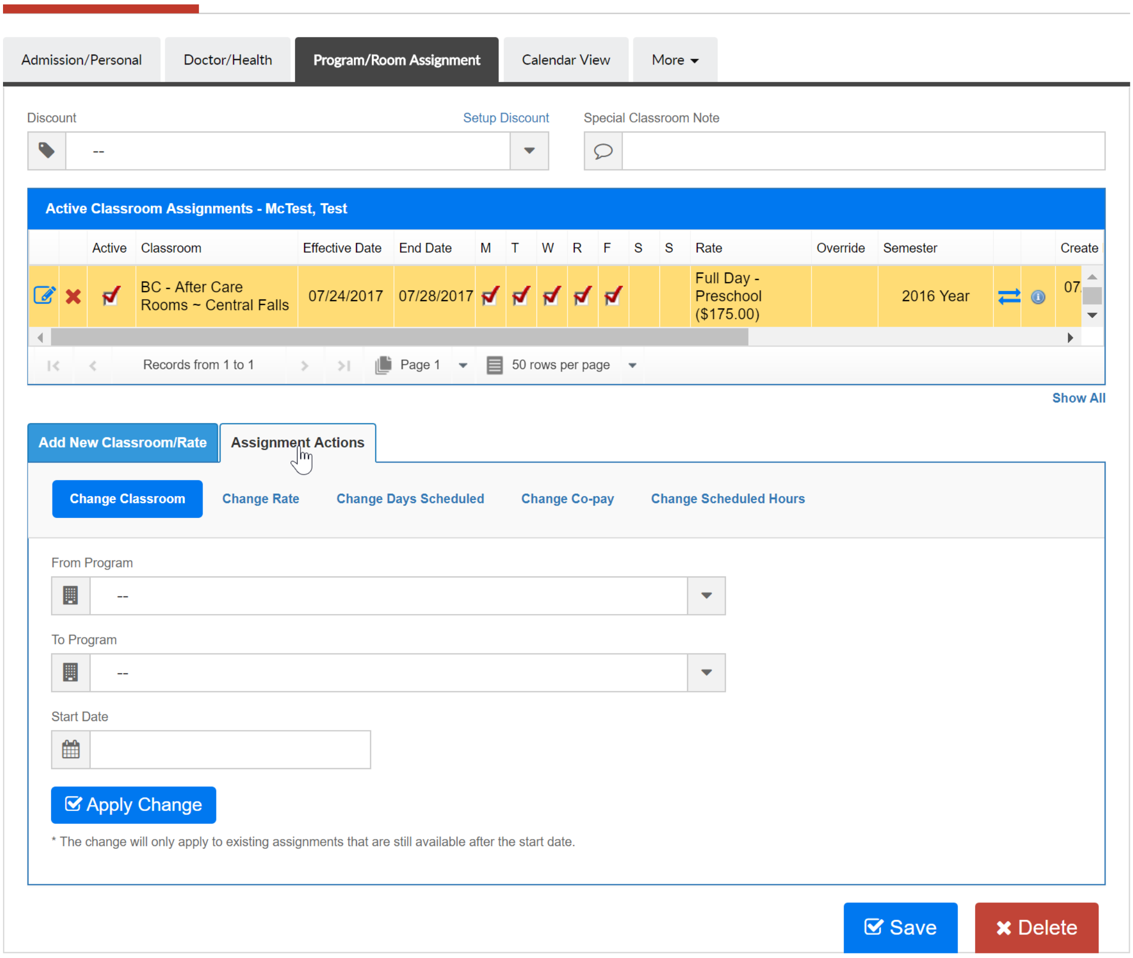
To Save the Program/Room assignment for the child press the Save button.

The Delete button will delete the child from the system.

Family Record, Child Tab-Program/Room Assignment, Assignment Actions

Last Modified on 01/03/2018 5:06 pm EST

You can use the Assignment Actions tab to make changes to existing child/student schedules. From the child record, go to the Program/Room Assignment tab and then select the Assignment Actions tab.



Discount: --

Special Classroom Note:

Active Classroom Assignments - McTest, Test

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	S	S	Rate	Override	Semester		Create
	✗	✓	BC - After Care Rooms ~ Central Falls	07/24/2017	07/28/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year		07

Records from 1 to 1 · Page 1 · 50 rows per page

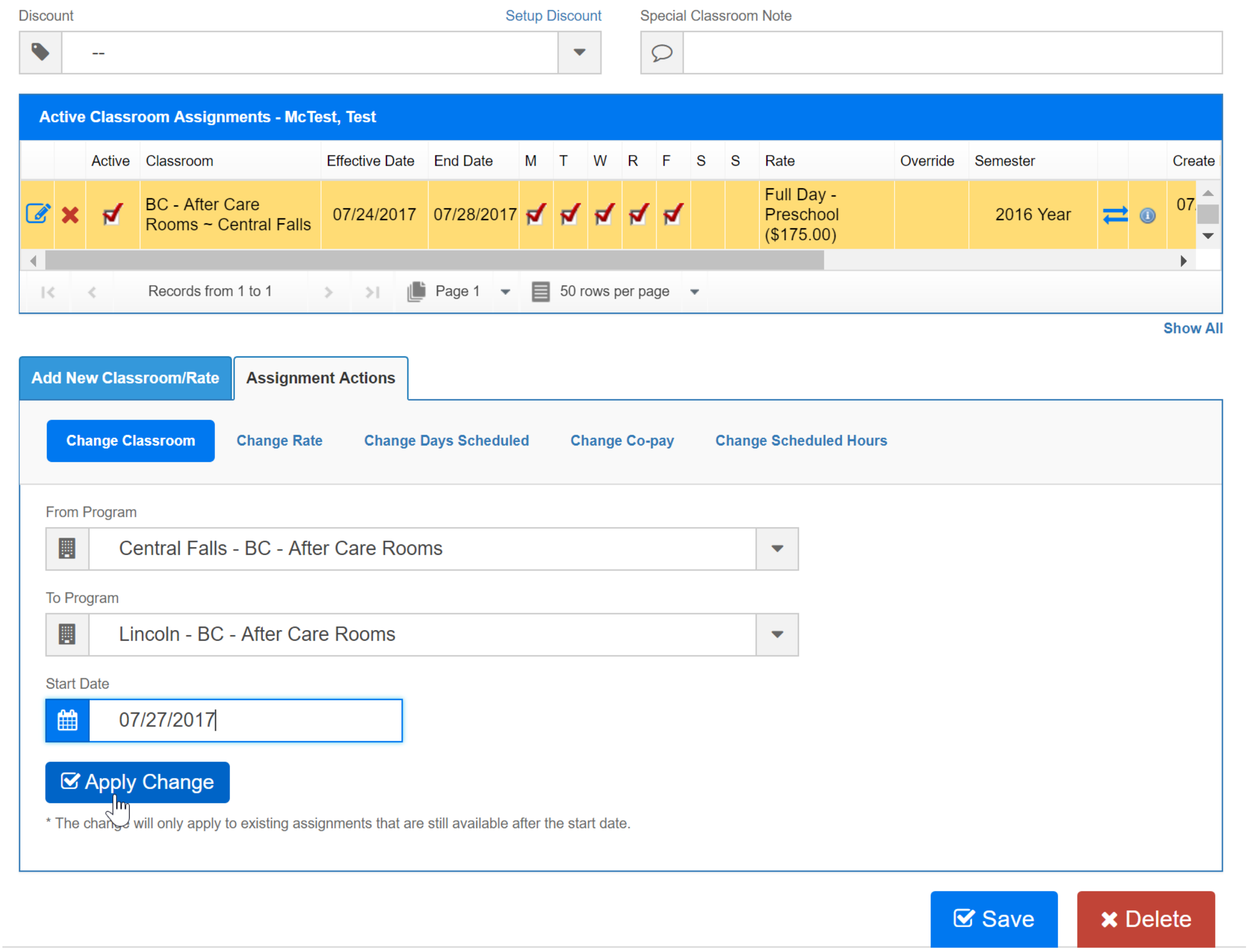
From Program: --

To Program: --

Start Date:

* The change will only apply to existing assignments that are still available after the start date.

If Change Classroom is selected, the system will end date the current Program/Room assignment and create a new one as of the start date that is entered.



Discount: --

Special Classroom Note:

Active Classroom Assignments - McTest, Test

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	S	S	Rate	Override	Semester			Create
		✓	BC - After Care Rooms ~ Central Falls	07/24/2017	07/28/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year			07

Records from 1 to 1 — Page 1 — 50 rows per page

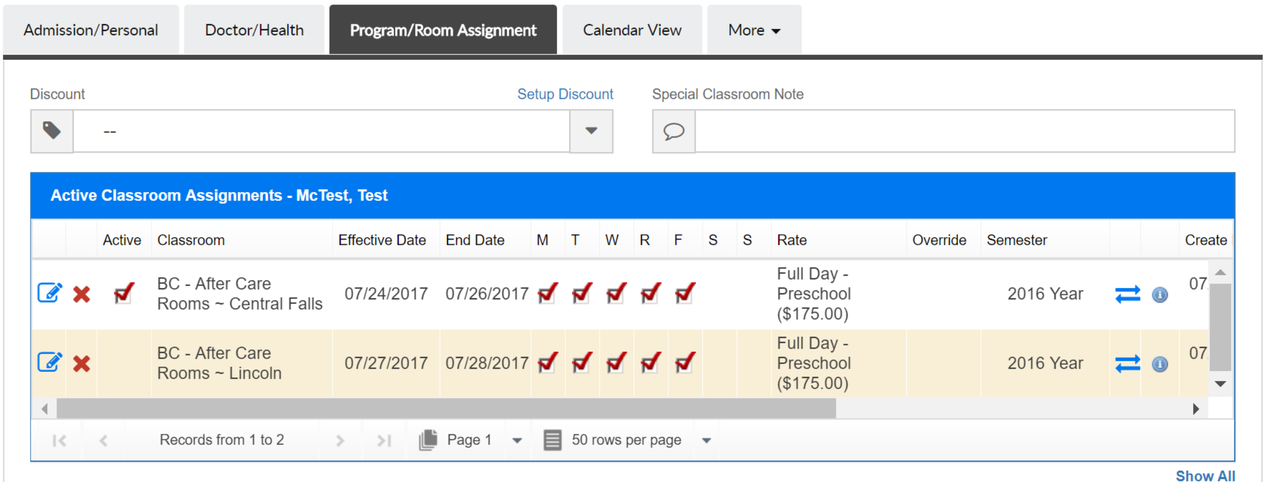
From Program: Central Falls - BC - After Care Rooms

To Program: Lincoln - BC - After Care Rooms

Start Date: 07/27/2017

* The change will only apply to existing assignments that are still available after the start date.

Once Apply Change is selected the screen will refresh, once on the program/room assignment tab old room assignment will be end dated and the new room assignment will display.



Discount: --

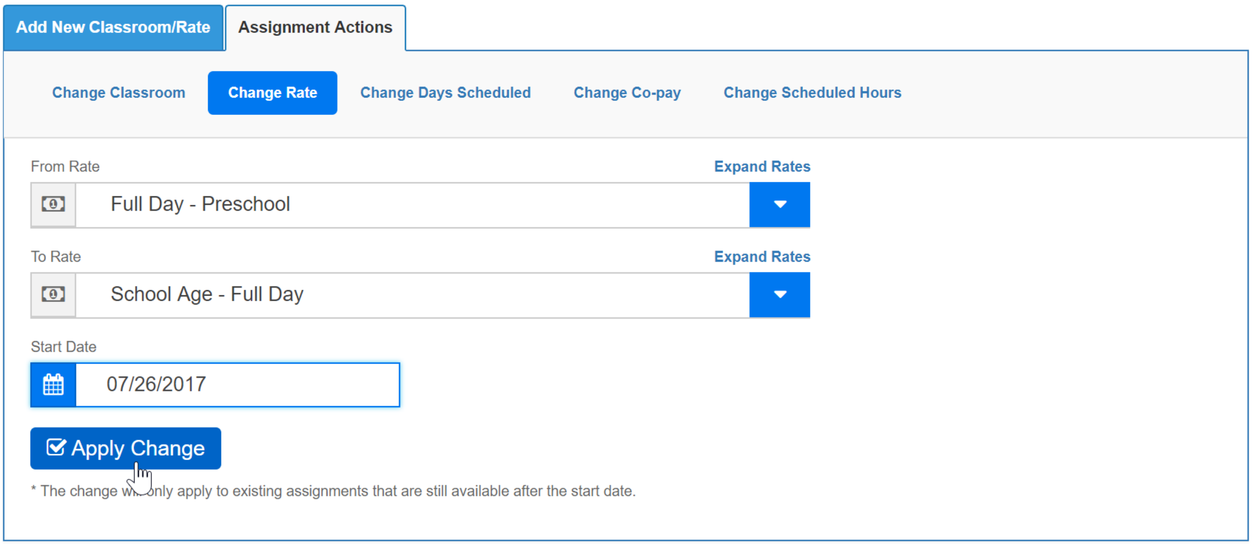
Special Classroom Note:

Active Classroom Assignments - McTest, Test

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	S	S	Rate	Override	Semester			Create
		✓	BC - After Care Rooms ~ Central Falls	07/24/2017	07/26/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year			07
			BC - After Care Rooms ~ Lincoln	07/27/2017	07/28/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year			07

Records from 1 to 2 — Page 1 — 50 rows per page

Change rate will update the assigned rate to a schedule-



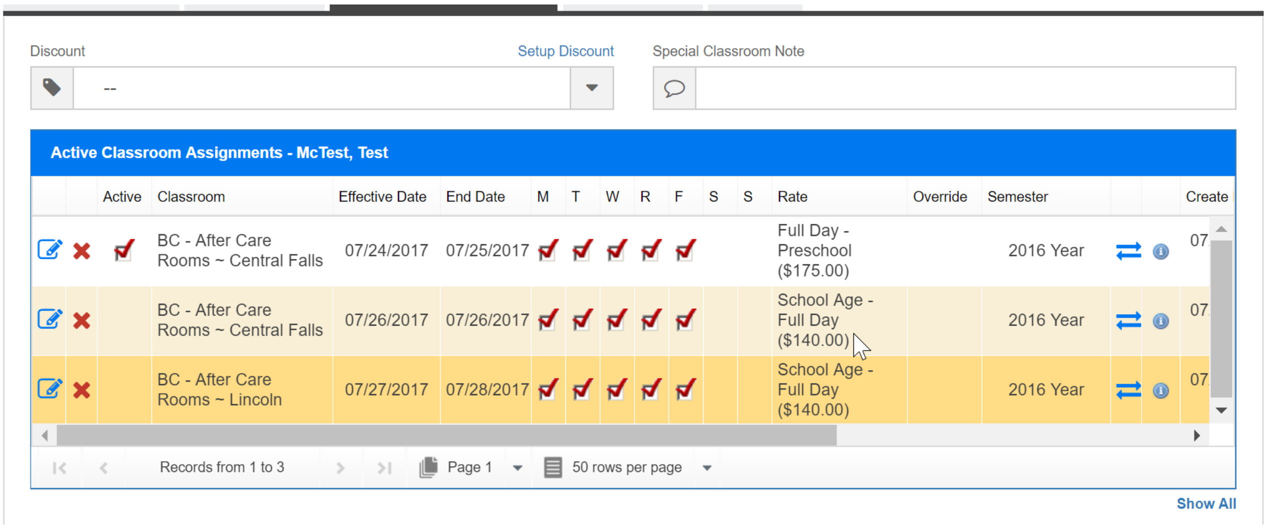
From Rate: Full Day - Preschool

To Rate: School Age - Full Day

Start Date: 07/26/2017

* The change w[illegible] only apply to existing assignments that are still available after the start date.

Select Apply Change and navigate back to the program/room assignment page to see the change, the rate has been updated in accordance to the assignment action.



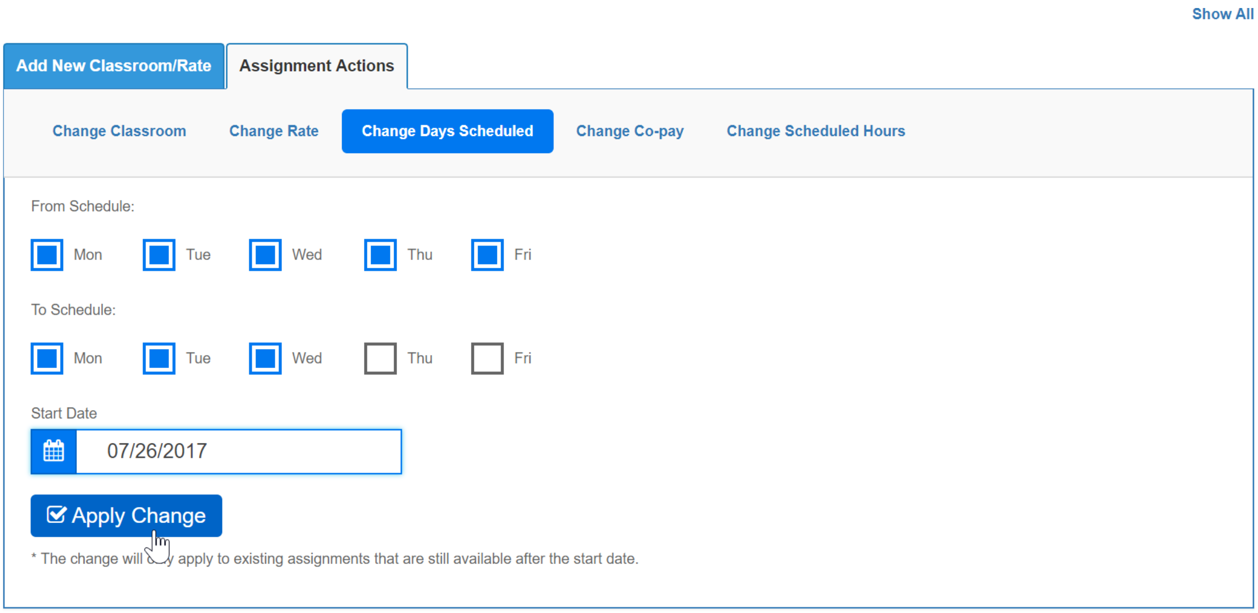
Discount: --

Special Classroom Note:

Active Classroom Assignments - McTest, Test

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	S	S	Rate	Override	Semester			Create
		✓	BC - After Care Rooms ~ Central Falls	07/24/2017	07/25/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year			07
			BC - After Care Rooms ~ Central Falls	07/26/2017	07/26/2017	✓	✓	✓	✓	✓			School Age - Full Day ($140.00)		2016 Year			07
			BC - After Care Rooms ~ Lincoln	07/27/2017	07/28/2017	✓	✓	✓	✓	✓			School Age - Full Day ($140.00)		2016 Year			07

Change days scheduled allows users to change the days a child is scheduled to attend-



Show All

From Schedule:

☑ Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri

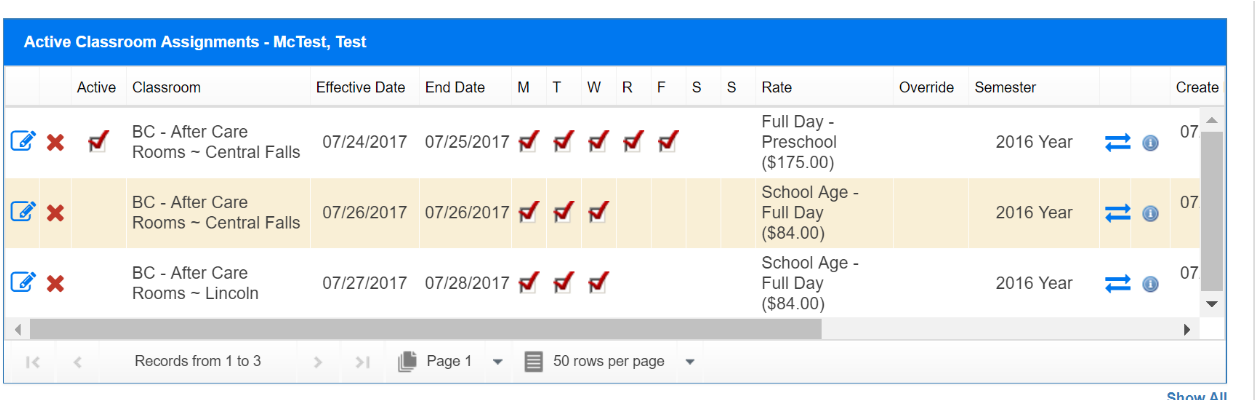
To Schedule:

☑ Mon ☑ Tue ☑ Wed ☐ Thu ☐ Fri

Start Date: 07/26/2017

* The change will only apply to existing assignments that are still available after the start date.

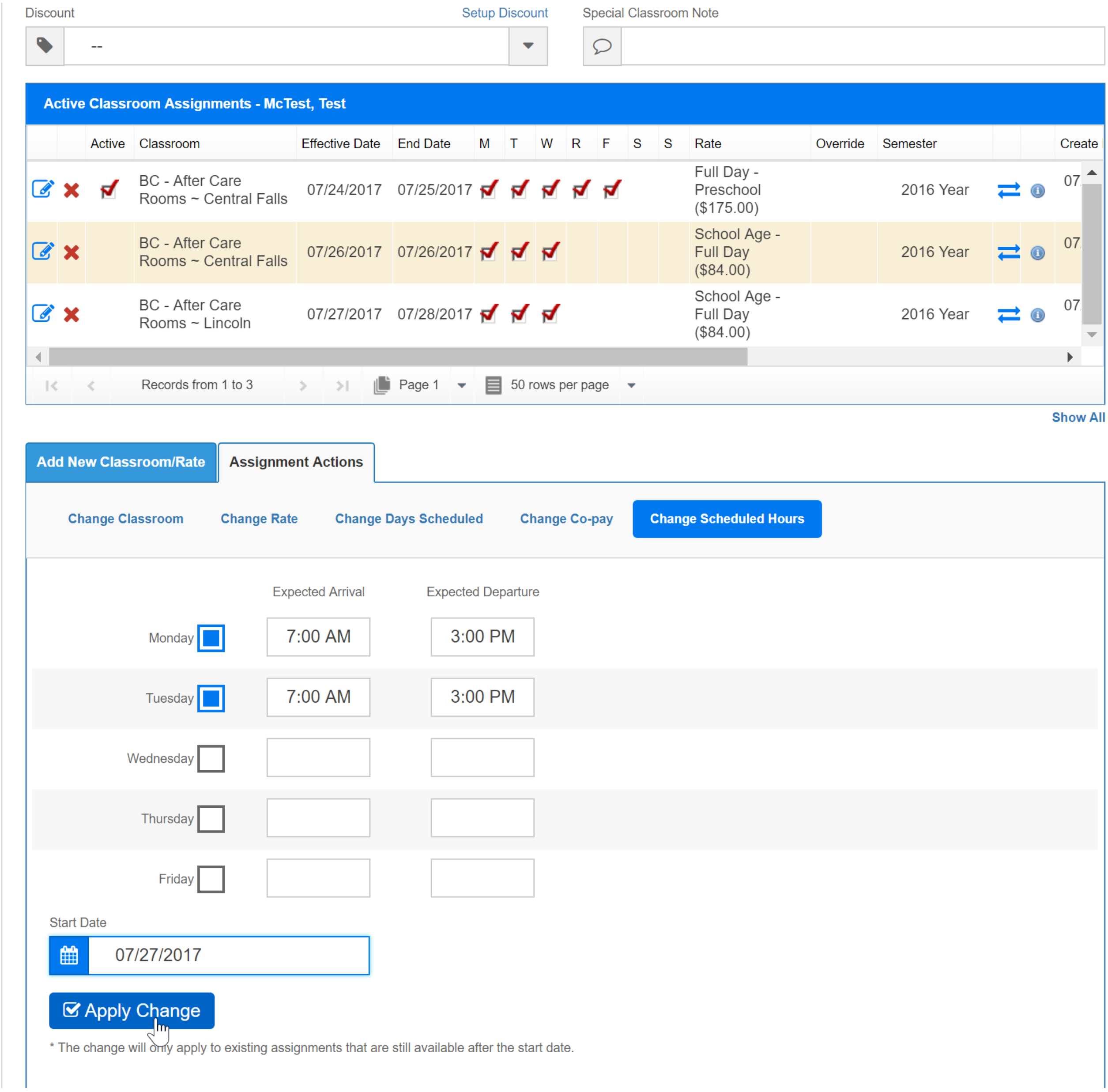
Select Apply Change and navigate back to the program/room assignment page to see the change, the scheduled days have been updated in accordance to the assignment action.



Active Classroom Assignments - McTest, Test

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	S	S	Rate	Override	Semester		Create
		✓	BC - After Care Rooms ~ Central Falls	07/24/2017	07/25/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year		07
			BC - After Care Rooms ~ Central Falls	07/26/2017	07/26/2017	✓	✓	✓					School Age - Full Day ($84.00)		2016 Year		07
			BC - After Care Rooms ~ Lincoln	07/27/2017	07/28/2017	✓	✓	✓					School Age - Full Day ($84.00)		2016 Year		07

Change scheduled hours allows users to change the hours a child is scheduled to


Discount — Setup Discount

--

Special Classroom Note

Active Classroom Assignments - McTest, Test

	Active	Classroom	Effective Date	End Date	M	T	W	R	F	S	S	Rate	Override	Semester		Create
	✓	BC - After Care Rooms ~ Central Falls	07/24/2017	07/25/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year		07
		BC - After Care Rooms ~ Central Falls	07/26/2017	07/26/2017	✓	✓	✓					School Age - Full Day ($84.00)		2016 Year		07
		BC - After Care Rooms ~ Lincoln	07/27/2017	07/28/2017	✓	✓	✓					School Age - Full Day ($84.00)		2016 Year		07

Records from 1 to 3 — Page 1 — 50 rows per page

Show All

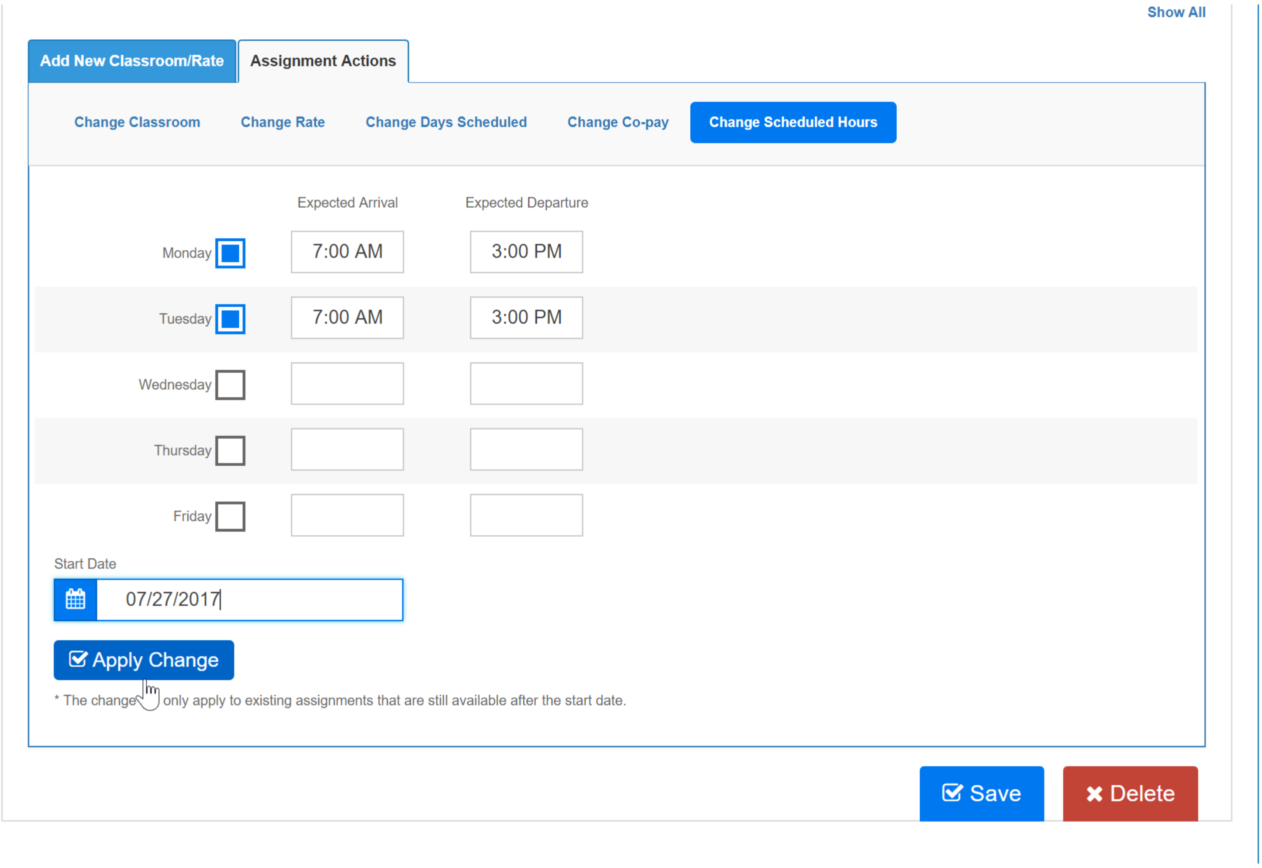
		Expected Arrival	Expected Departure
Monday	☑	7:00 AM	3:00 PM
Tuesday	☑	7:00 AM	3:00 PM
Wednesday	☐		
Thursday	☐		
Friday	☐		

Start Date: 07/27/2017

* The change will only apply to existing assignments that are still available after the start date.

attend

Select Apply Change and navigate back to the program/room assignment page to see the change, the scheduled hours have been updated in accordance to the assignment action.

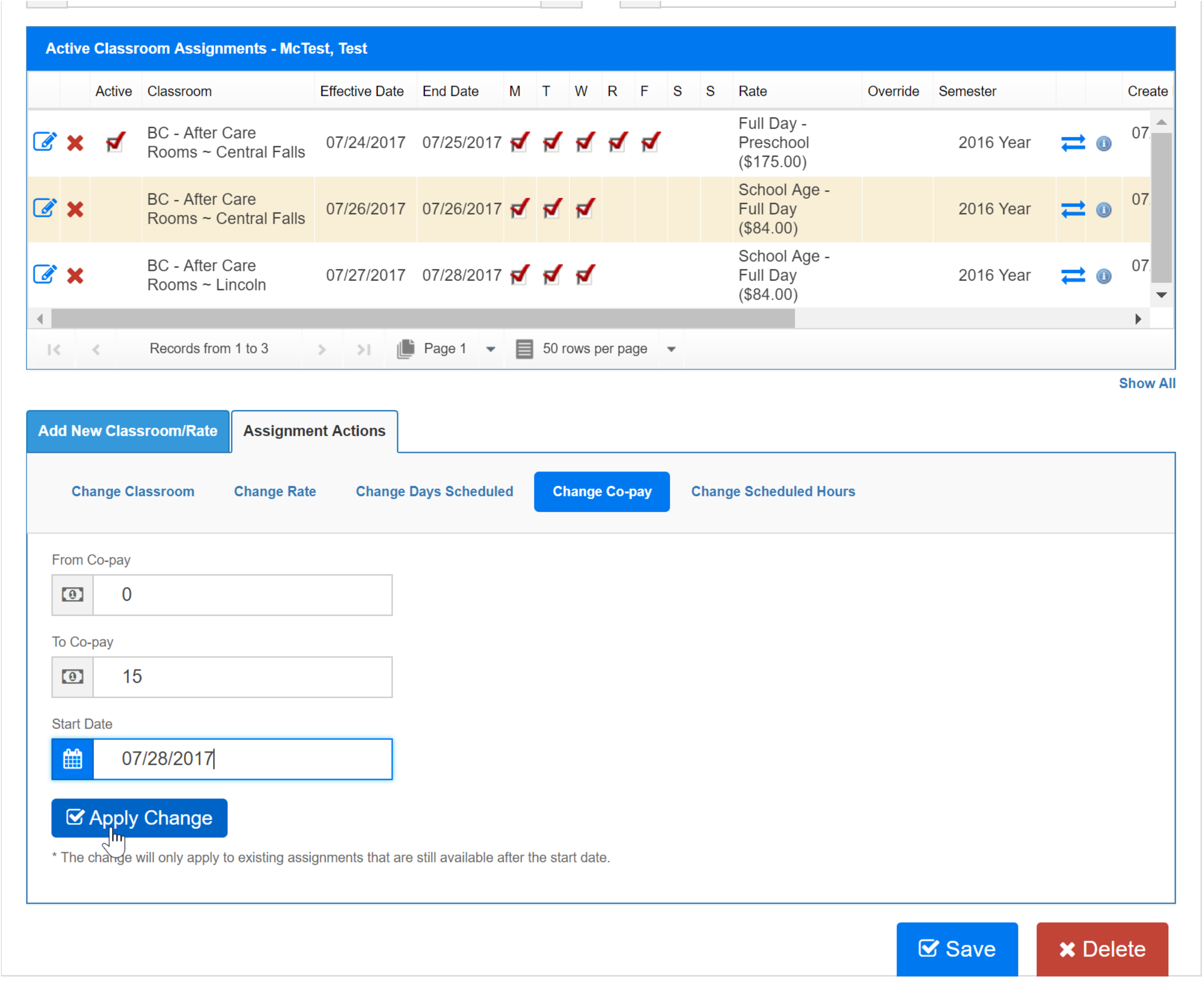


	Expected Arrival	Expected Departure
Monday ☑	7:00 AM	3:00 PM
Tuesday ☑	7:00 AM	3:00 PM
Wednesday ☐		
Thursday ☐		
Friday ☐		

Start Date: 07/27/2017

* The change will only apply to existing assignments that are still available after the start date.

Change co-pay will update the copay amount for a family if not using template type billing for third parties-


Active Classroom Assignments - McTest, Test

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	S	S	Rate	Override	Semester		Create
✎	✗	✓	BC - After Care Rooms ~ Central Falls	07/24/2017	07/25/2017	✓	✓	✓	✓	✓			Full Day - Preschool ($175.00)		2016 Year	⇄ ⓘ	07
✎	✗		BC - After Care Rooms ~ Central Falls	07/26/2017	07/26/2017	✓	✓	✓					School Age - Full Day ($84.00)		2016 Year	⇄ ⓘ	07
✎	✗		BC - After Care Rooms ~ Lincoln	07/27/2017	07/28/2017	✓	✓	✓					School Age - Full Day ($84.00)		2016 Year	⇄ ⓘ	07

Records from 1 to 3 Page 1 50 rows per page

From Co-pay: 0

To Co-pay: 15

Start Date: 07/28/2017

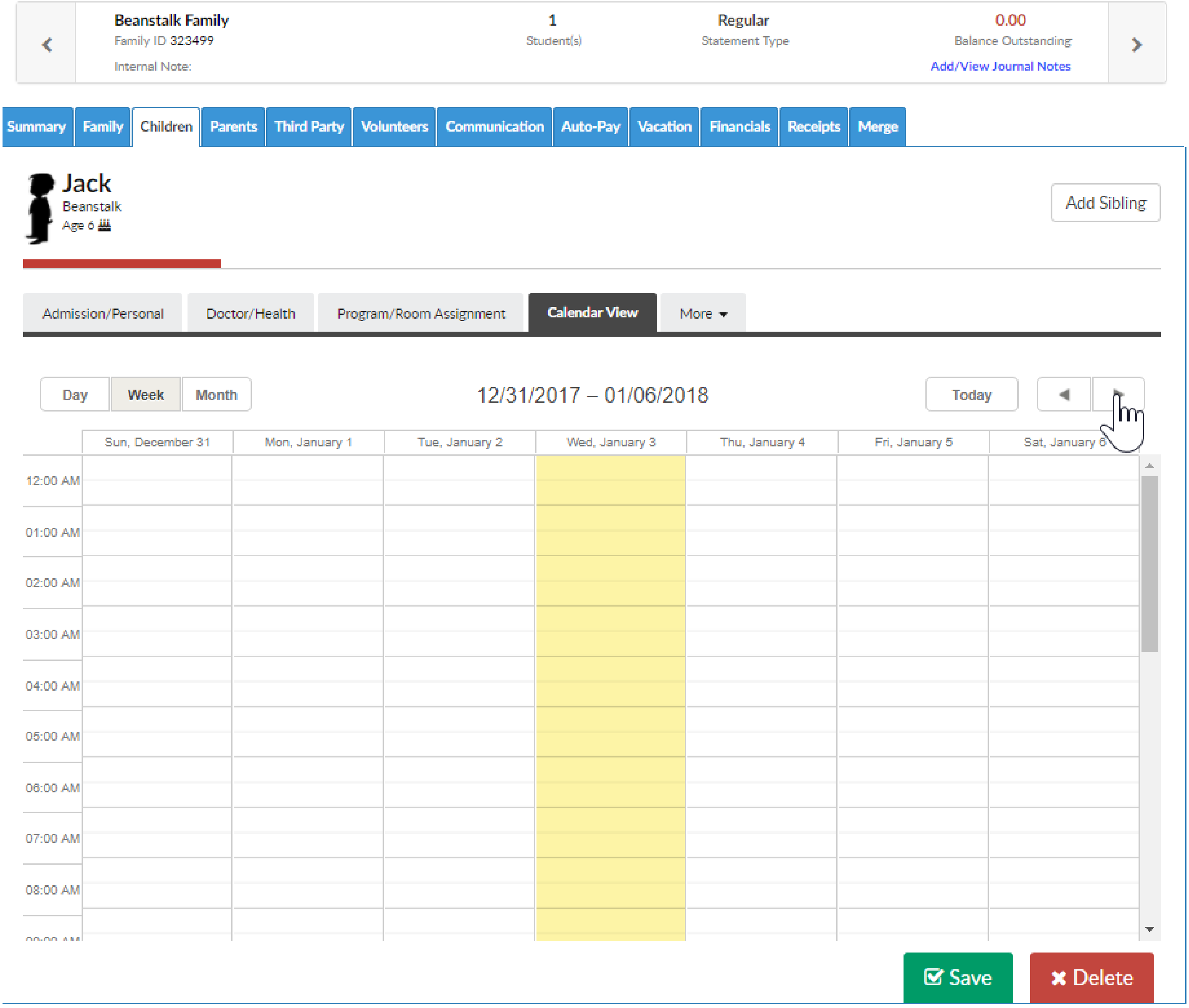
* The change will only apply to existing assignments that are still available after the start date.

Select Apply Change and navigate back to the program/room assignment page to see the change, the scheduled days have been updated in accordance to the assignment action.

Family Record, Child Tab- Calendar View

Last Modified on 01/03/2018 5:12 pm EST

From the family record, on the child tab the Calendar View option will display. The Calendar View displays the student's schedule in a calendar format. This can not be exported it is for admin/staff visual purposes only. The view can be changed between Day/Month/Week. Select the triangle icons to move between time periods.



Beanstalk Family
Family ID 323499
Internal Note:

1 Student(s)

Regular Statement Type

0.00 Balance Outstanding

Jack
Beanstalk
Age 6

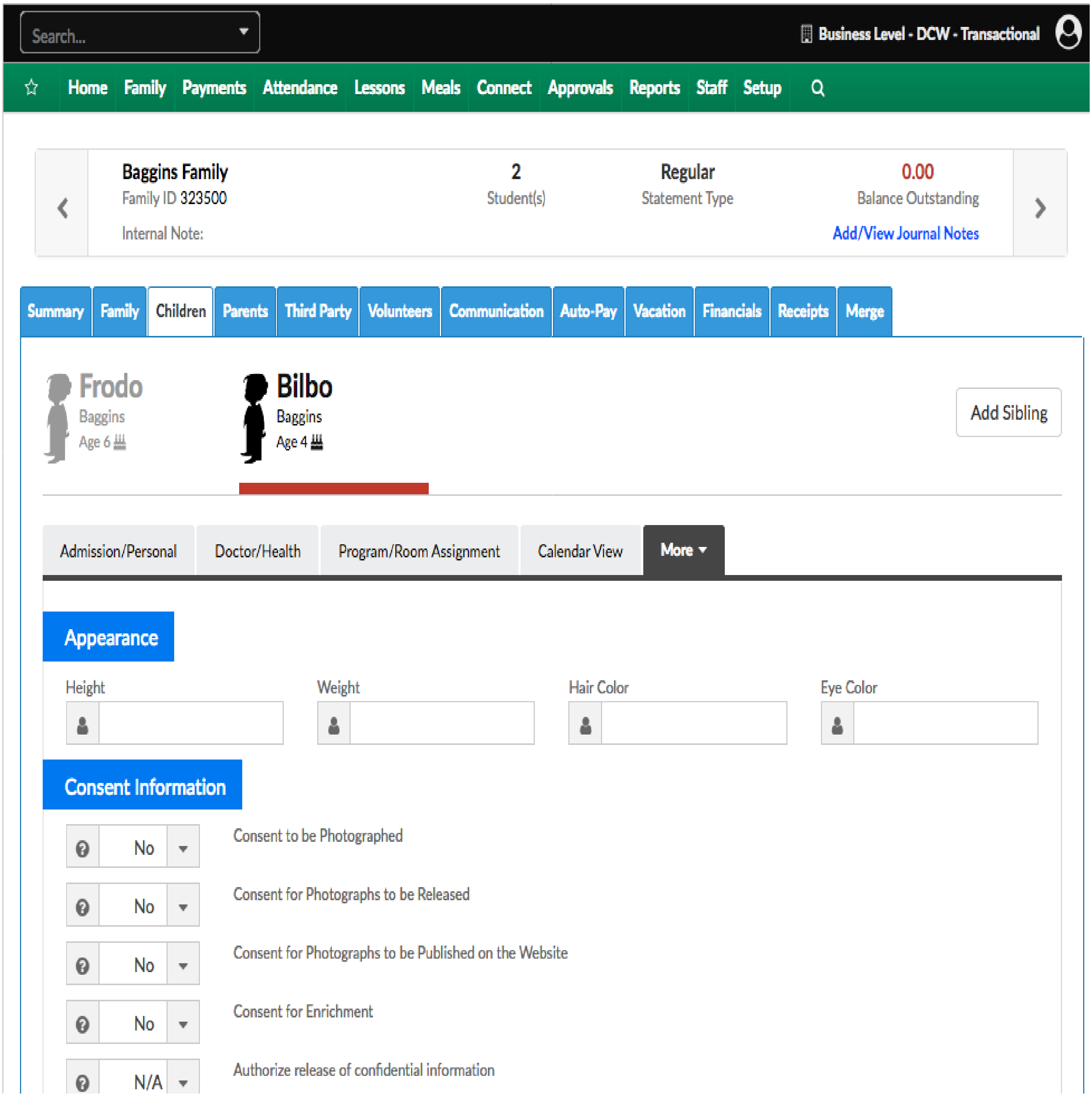
12/31/2017 – 01/06/2018

Family Record, Child Tab- More, Additional Information

Last Modified on 06/29/2018 4:33 pm EDT

From the More drop down list on the Child tab of the family record, select the Additional Information option display detail about the child that can be collected from the registration process or entered/updated manually.

- Parents are also able to edit detail for the child on the parent portal if correct permissions are granted.



Baggins Family
Family ID 323500
Internal Note:

2 Student(s)

Regular Statement Type

0.00 Balance Outstanding

Frodo Baggins Age 6

Bilbo Baggins Age 4

Appearance

Height

Weight

Hair Color

Eye Color

Consent Information

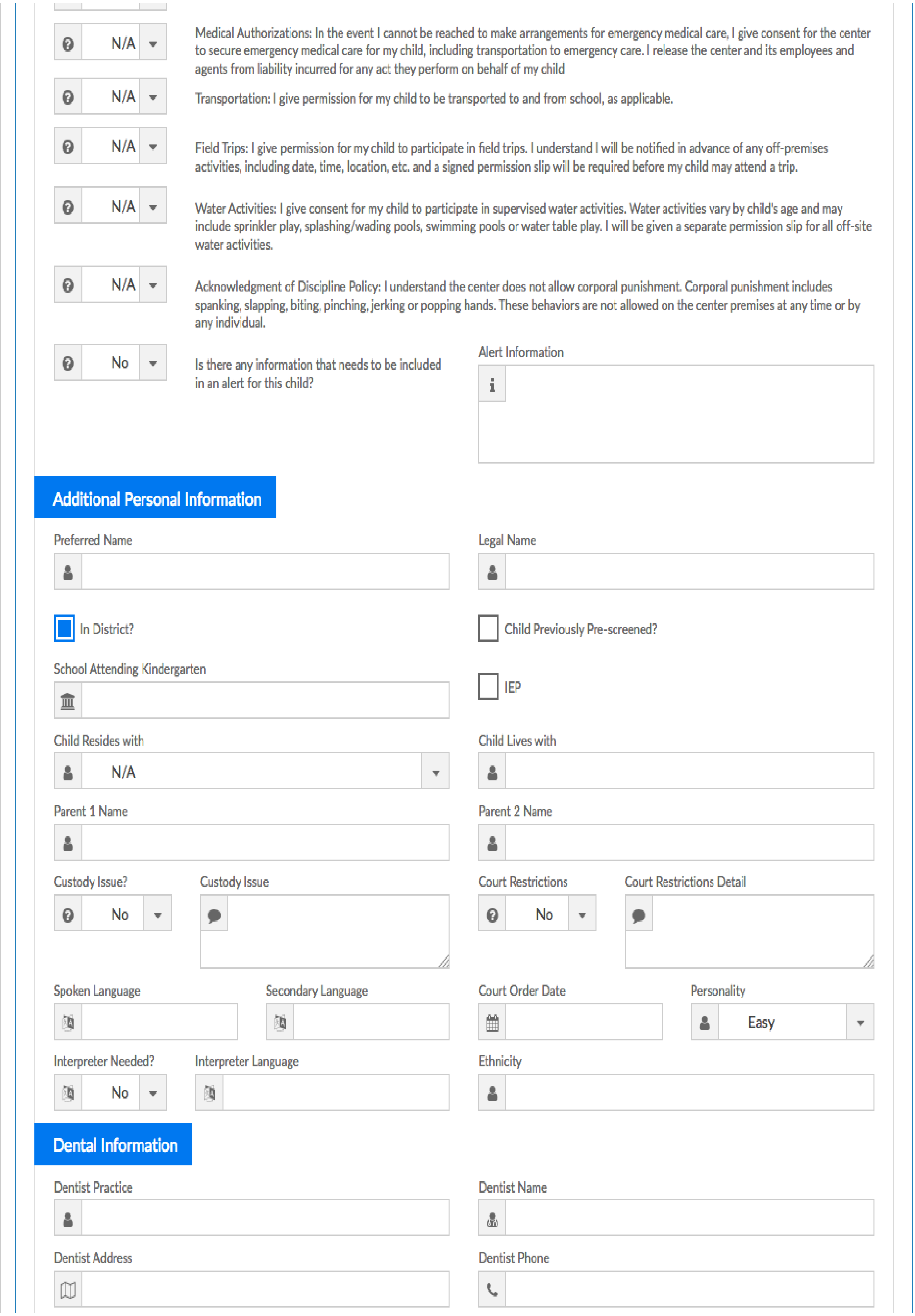
No Consent to be Photographed

No Consent for Photographs to be Released

No Consent for Photographs to be Published on the Website

No Consent for Enrichment

N/A Authorize release of confidential information



N/A

Medical Authorizations: In the event I cannot be reached to make arrangements for emergency medical care, I give consent for the center to secure emergency medical care for my child, including transportation to emergency care. I release the center and its employees and agents from liability incurred for any act they perform on behalf of my child

N/A

Transportation: I give permission for my child to be transported to and from school, as applicable.

N/A

Field Trips: I give permission for my child to participate in field trips. I understand I will be notified in advance of any off-premises activities, including date, time, location, etc. and a signed permission slip will be required before my child may attend a trip.

N/A

Water Activities: I give consent for my child to participate in supervised water activities. Water activities vary by child's age and may include sprinkler play, splashing/wading pools, swimming pools or water table play. I will be given a separate permission slip for all off-site water activities.

N/A

Acknowledgment of Discipline Policy: I understand the center does not allow corporal punishment. Corporal punishment includes spanking, slapping, biting, pinching, jerking or popping hands. These behaviors are not allowed on the center premises at any time or by any individual.

No

Is there any information that needs to be included in an alert for this child?

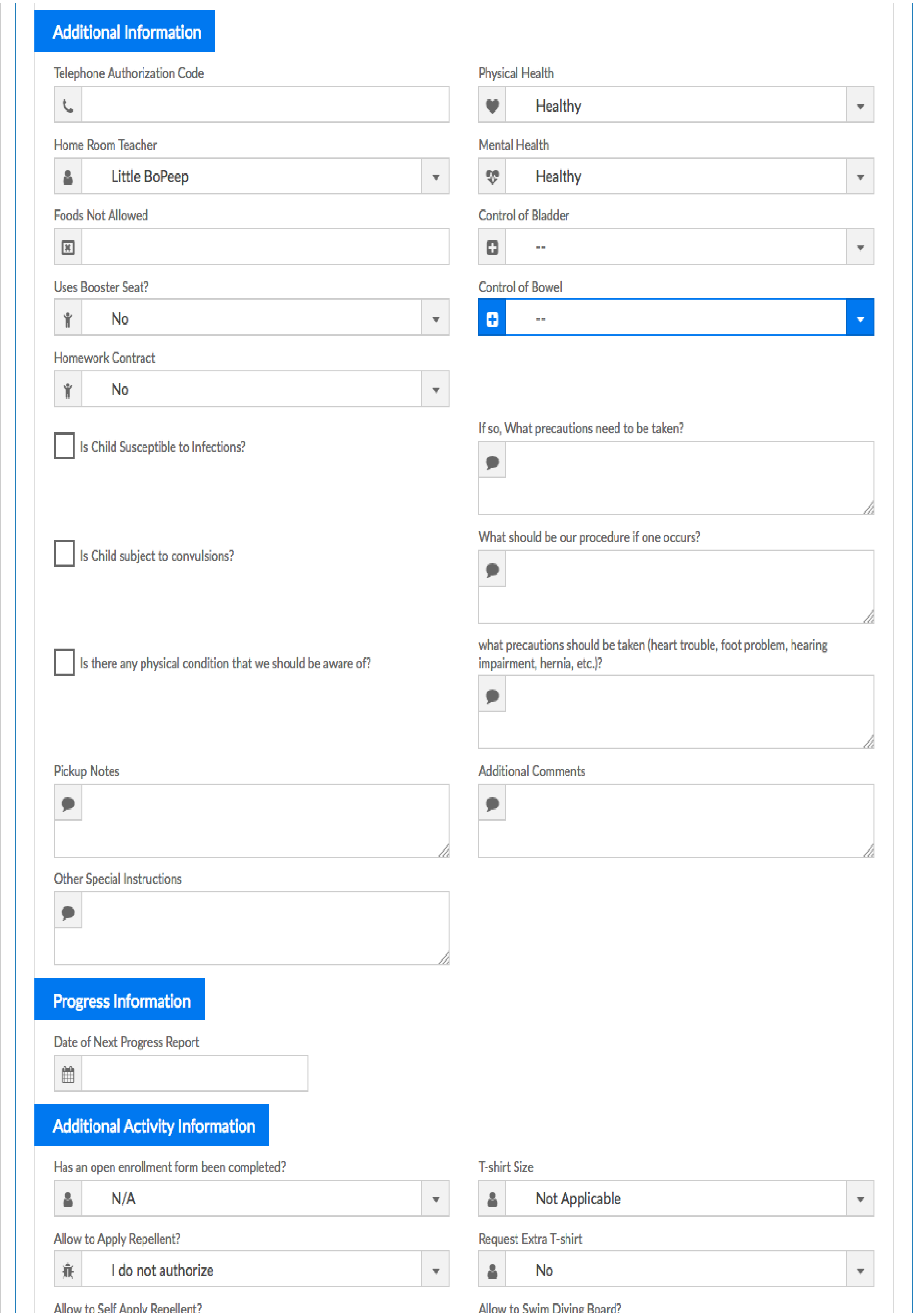
Alert Information:

Additional Personal Information

Preferred Name:
Legal Name:
☑ In District?
☐ Child Previously Pre-screened?
School Attending Kindergarten:
☐ IEP
Child Resides with: N/A
Child Lives with:
Parent 1 Name:
Parent 2 Name:
Custody Issue?: No
Custody Issue:
Court Restrictions: No
Court Restrictions Detail:
Spoken Language:
Secondary Language:
Court Order Date:
Personality: Easy
Interpreter Needed?: No
Interpreter Language:
Ethnicity:

Dental Information

Dentist Practice:
Dentist Name:
Dentist Address:
Dentist Phone:



Additional Information

Telephone Authorization Code

Physical Health: Healthy

Home Room Teacher: Little BoPeep

Mental Health: Healthy

Foods Not Allowed

Control of Bladder: --

Uses Booster Seat?: No

Control of Bowel: --

Homework Contract: No

☐ Is Child Susceptible to Infections?

If so, What precautions need to be taken?

☐ Is Child subject to convulsions?

What should be our procedure if one occurs?

☐ Is there any physical condition that we should be aware of?

what precautions should be taken (heart trouble, foot problem, hearing impairment, hernia, etc.)?

Pickup Notes

Additional Comments

Other Special Instructions

Progress Information

Date of Next Progress Report

Additional Activity Information

Has an open enrollment form been completed?: N/A

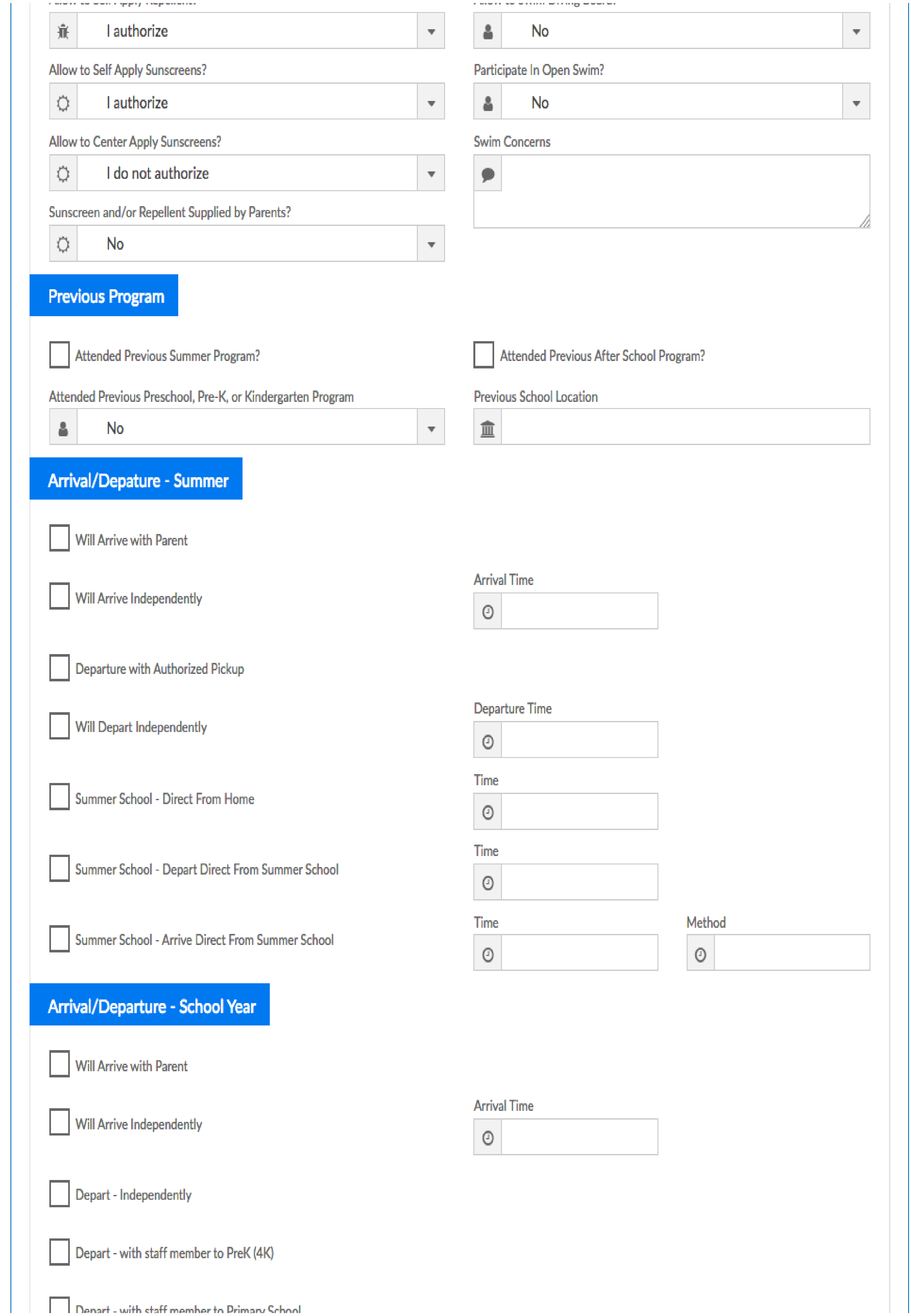
T-shirt Size: Not Applicable

Allow to Apply Repellent?: I do not authorize

Request Extra T-shirt: No

Allow to Self Apply Repellent?

Allow to Swim Diving Board?



I authorize

No

Allow to Self Apply Sunscreens?
I authorize

Participate In Open Swim?
No

Allow to Center Apply Sunscreens?
I do not authorize

Swim Concerns

Sunscreen and/or Repellent Supplied by Parents?
No

Previous Program

☐ Attended Previous Summer Program?

☐ Attended Previous After School Program?

Attended Previous Preschool, Pre-K, or Kindergarten Program
No

Previous School Location

Arrival/Depature - Summer

☐ Will Arrive with Parent

☐ Will Arrive Independently

Arrival Time

☐ Departure with Authorized Pickup

☐ Will Depart Independently

Departure Time

☐ Summer School - Direct From Home

Time

☐ Summer School - Depart Direct From Summer School

Time

☐ Summer School - Arrive Direct From Summer School

Time

Method

Arrival/Departure - School Year

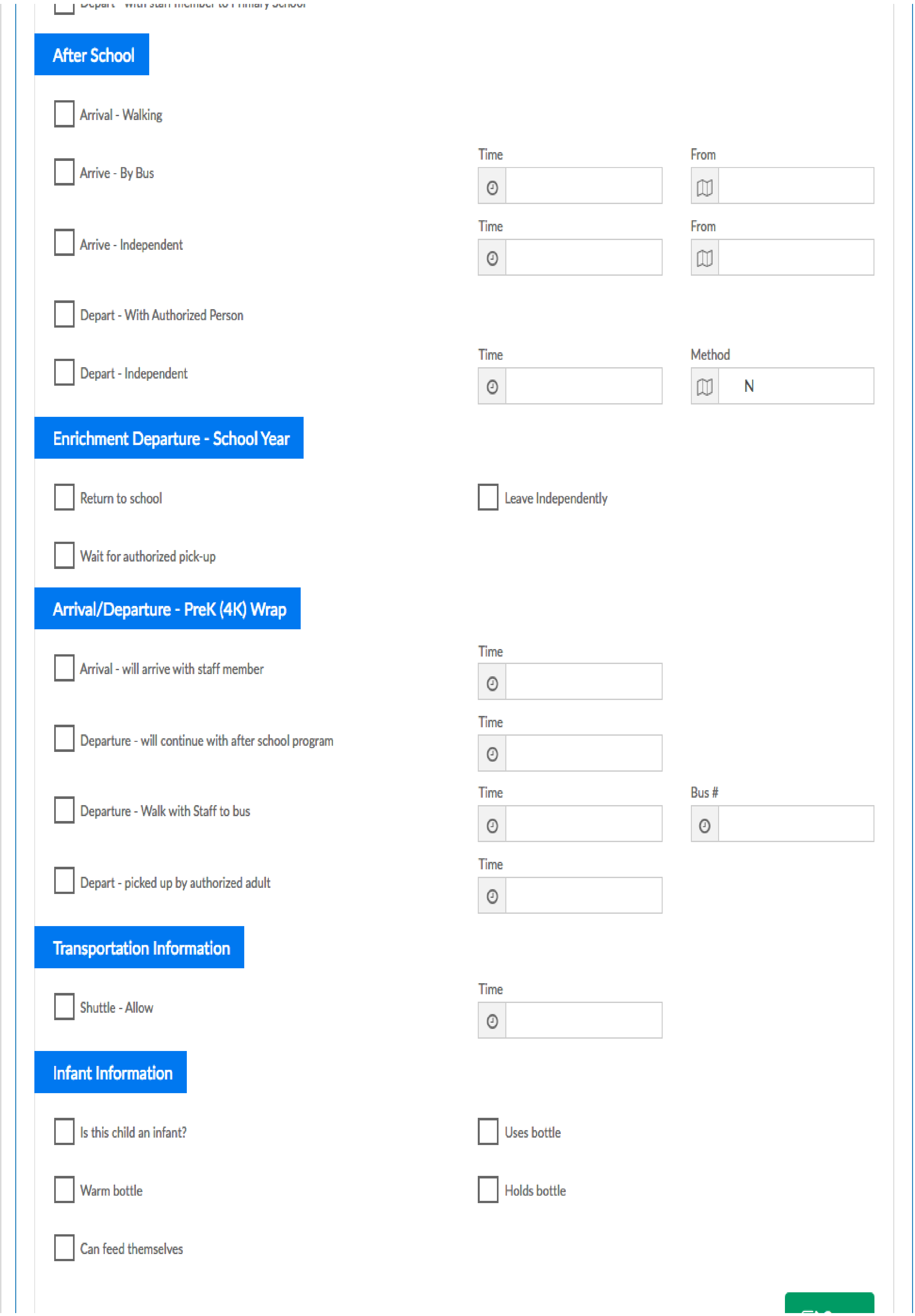
☐ Will Arrive with Parent

☐ Will Arrive Independently

Arrival Time

☐ Depart - Independently

☐ Depart - with staff member to PreK (4K)



☐ Depart - With staff member to Primary School

After School

☐ Arrival - Walking

☐ Arrive - By Bus
Time
From

☐ Arrive - Independent
Time
From

☐ Depart - With Authorized Person

☐ Depart - Independent
Time
Method: N

Enrichment Departure - School Year

☐ Return to school

☐ Leave Independently

☐ Wait for authorized pick-up

Arrival/Departure - PreK (4K) Wrap

☐ Arrival - will arrive with staff member
Time

☐ Departure - will continue with after school program
Time

☐ Departure - Walk with Staff to bus
Time
Bus #

☐ Depart - picked up by authorized adult
Time

Transportation Information

☐ Shuttle - Allow
Time

Infant Information

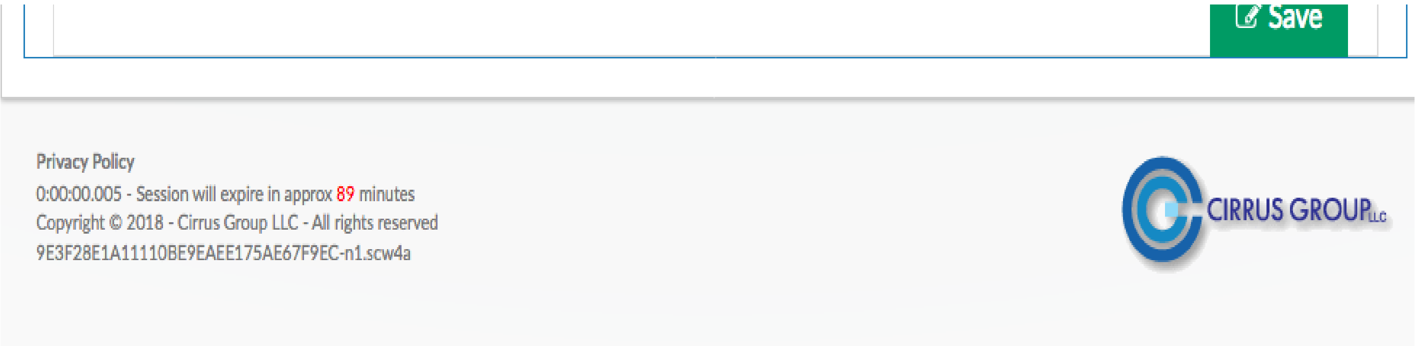
☐ Is this child an infant?

☐ Uses bottle

☐ Warm bottle

☐ Holds bottle

☐ Can feed themselves



Privacy Policy
0:00:00.005 - Session will expire in approx 89 minutes
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Appearance

- Height
- Weight
- Hair Color
- Eye Color

Consent Information

- Consent to be Photographed
- Consent for Photographs to be Released
- Consent for Photographs to be Published on the Website
- Consent for Enrichment
- Authorize release of confidential information
- Medical Authorizations: In the event I cannot be reached to make arrangements for emergency medical care, I give consent for the center to secure emergency medical care for my child, including transportation to emergency care. I release the center and its employees and agents from liability incurred for any act they perform on behalf of my child
- Transportation: I give permission for my child to be transported to and from school, as applicable.
- Field Trips: I give permission for my child to participate in field trips. I understand I will be notified in advance of any off-premises activities, including date, time, location, etc. and a signed permission slip will be required before my child may attend a trip.
- Water Activities: I give consent for my child to participate in supervised water activities. Water activities vary by child's age and may include sprinkler play,

splashing/wading pools, swimming pools or water table play. I will be given a separate permission slip for all off-site water activities.

- Acknowledgment of Discipline Policy: I understand the center does not allow corporal punishment. Corporal punishment includes spanking, slapping, biting, pinching, jerking or popping hands. These behaviors are not allowed on the center premises at any time or by any individual.
- Is there any information that needs to be included in an alert for this child? Alert Information

Additional Personal Information

- Preferred Name
- Legal Name
- In District?
- Child Previously Pre-screened?
- School Attending Kindergarten
- IEP
- Child Resides with
- Child Lives with
- Parent 1 Name
- Parent 2 Name
- Custody Issue?
- Court Restrictions
    - Court Restrictions Detail
- Spoken Language
- Secondary Language
- Court Order Date
- Personality
- Interpreter Needed?
- Interpreter Language
- Ethnicity

Dental Information

- Dentist Practice
- Dentist Name
- Dentist Address
- Dentist Phone

Additional Information

- Telephone Authorization Code
- Home Room Teacher
- Foods Not Allowed
- Uses Booster Seat?
- Homework Contract
- Physical Health
- Mental Health
- Control of Bladder
- Control of Bowel
- Is Child Susceptible to Infections?
    - If so, What precautions need to be taken?
- Is Child subject to convulsions?
    - What should be our procedure if one occurs?
- Is there any physical condition that we should be aware of?
    - what precautions should be taken (heart trouble, foot problem, hearing impairment, hernia, etc.)?
- Pickup Notes
- Additional Comments
- Other Special Instructions

Progress Information

- Date of Next Progress Report

Additional Activity Information

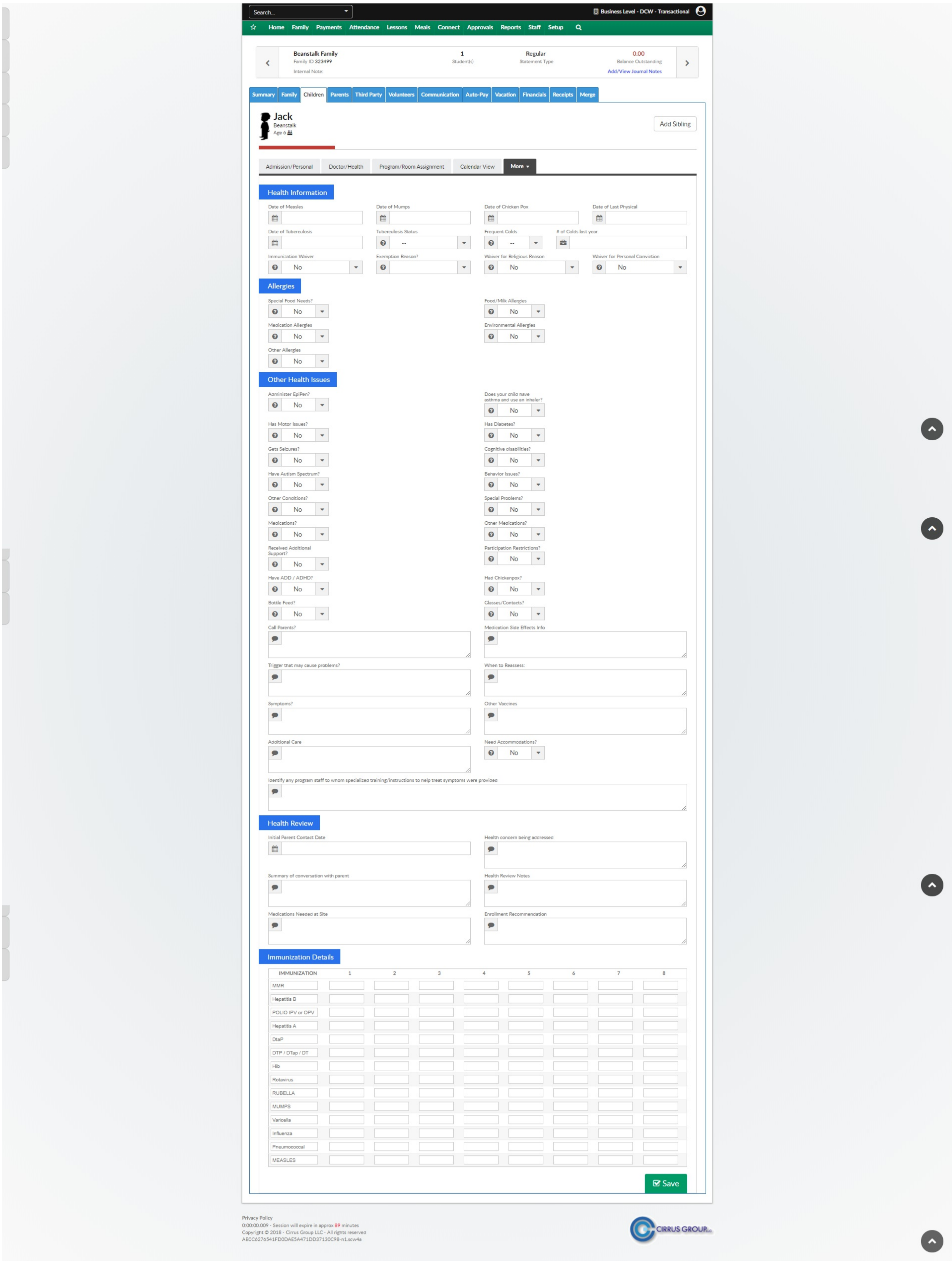
- Has an open enrollment form been completed?
- Allow to Apply Repellent?

- Allow to Self Apply Repellent?
- Allow to Self Apply Sunscreens?
- Allow to Center Apply Sunscreens?
- Sunscreen and/or Repellent Supplied by Parents?
- T-shirt Size (based on valid values- setup > system config, valid values)
- Request Extra T-shirt
- Allow to Swim Diving Board?
- Participate In Open Swim?
- Swim Concerns

Family Record, Child Tab- More, Health

Last Modified on 06/29/2018 4:15 pm EDT

The More, Health screen displays detailed information on child/student allergies and general health information such as immunizations, additional support detail and specific need information.



Beanstalk Family
Family ID 323499
Internal Note:
1 Student(s)
Regular Statement Type
0.00 Balance Outstanding
Add/View Journal Notes

Jack
Beanstalk
Age 6

Health Information

Date of Measles
Date of Mumps
Date of Chicken Pox
Date of Last Physical
Date of Tuberculosis
Tuberculosis Status: --
Frequent Colds: --
# of Colds last year
Immunization Waiver: No
Exemption Reason?
Waiver for Religious Reason: No
Waiver for Personal Conviction: No

Allergies

Special Food Needs?: No
Food/Milk Allergies: No
Medication Allergies: No
Environmental Allergies: No
Other Allergies: No

Other Health Issues

Administer EpiPen?: No
Does your child have asthma and use an inhaler?: No
Has Motor Issues?: No
Has Diabetes?: No
Gets Seizures?: No
Cognitive disabilities?: No
Have Autism Spectrum?: No
Behavior Issues?: No
Other Conditions?: No
Special Problems?: No
Medications?: No
Other Medications?: No
Received Additional Support?: No
Participation Restrictions?: No
Have ADD / ADHD?: No
Had Chickenpox?: No
Bottle Feed?: No
Glasses/Contacts?: No
Call Parents?
Medication Side Effects Info
Trigger that may cause problems?
When to Reassess:
Symptoms?
Other Vaccines
Additional Care
Need Accommodations?: No
Identify any program staff to whom specialized training/instructions to help treat symptoms were provided

Health Review

Initial Parent Contact Date
Health concern being addressed
Summary of conversation with parent
Health Review Notes
Medications Needed at Site
Enrollment Recommendation

Immunization Details

IMMUNIZATION	1	2	3	4	5	6	7	8
MMR								
Hepatitis B								
POLIO IPV or OPV								
Hepatitis A								
DtaP								
DTP / DTap / DT								
Hib								
Rotavirus								
RUBELLA								
MUMPS								
Varicella								
Influenza								
Pneumococcal								
MEASLES								

0:00:00.009 - Session will expire in approx 89 minutes
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AB0C6276541FD0DAE5A471DD37130C98-n1.scw4a

Available fields:

Date of Measles

Date of Mumps

Date of Chicken Pox

Date of Last Physical

Date of Tuberculosis

Tuberculosis Status

Frequent Colds

# of Colds last year

Immunization Waiver

Exemption Reason?

Waiver for Religious Reason

Waiver for Personal Conviction

Special Food Needs

Food/Milk Allergies

Medication Allergies

Environmental Allergies

Other Allergies

Administer EpiPen?

Does your child have asthma and use an inhaler?

Has motor issues?

Has diabetes?

Gets seizures?

Cognitive disabilities?

Have autism spectrum?

Behavior Issues?

Other conditions?

Special problems?

Medications?

Other Medications?

Received additional support?

Participation restrictions?

Have ADD/ADHD?

Had chickenpox?

Bottle Feed?

Glasses/Contacts?

Call Parents?

Medication Side Effects Info

Trigger that may cause problems?

When to Reassess:

Symptoms?

Other Vaccines

Additional Care

Need Accommodations?

Identify any program staff to whom specialized training/instructions to help treat symptoms were provided

Initial Parent Contact Date

Health concern being addressed

Summary of conversation with parent

Medications Needed at Site

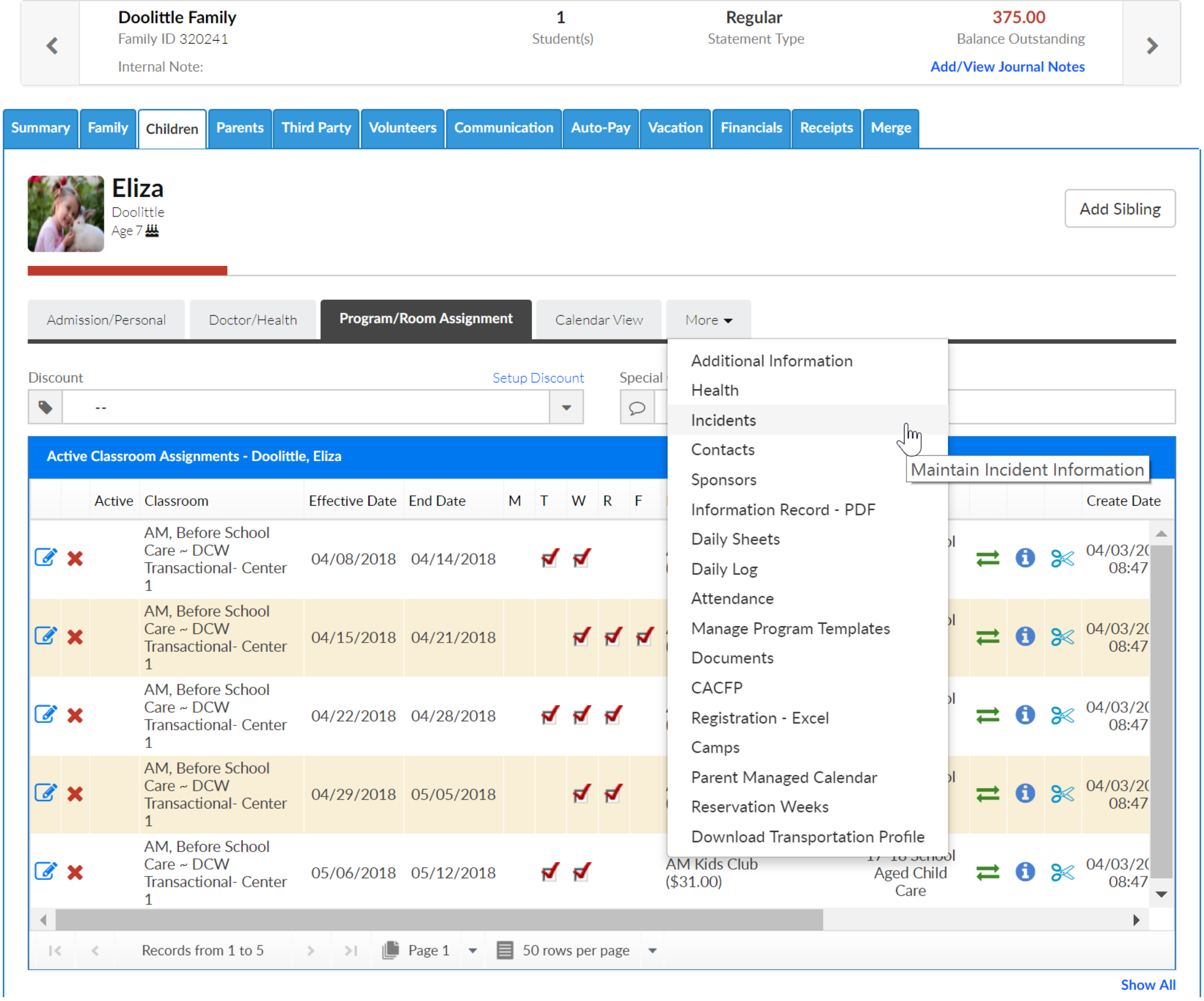
Enrollment Recommendation

Immunization Details

Family Record, Child Tab- More, Incidents

Last Modified on 04/03/2018 9:21 am EDT

From the Child record, go to the more tab- then select the Incidents option.

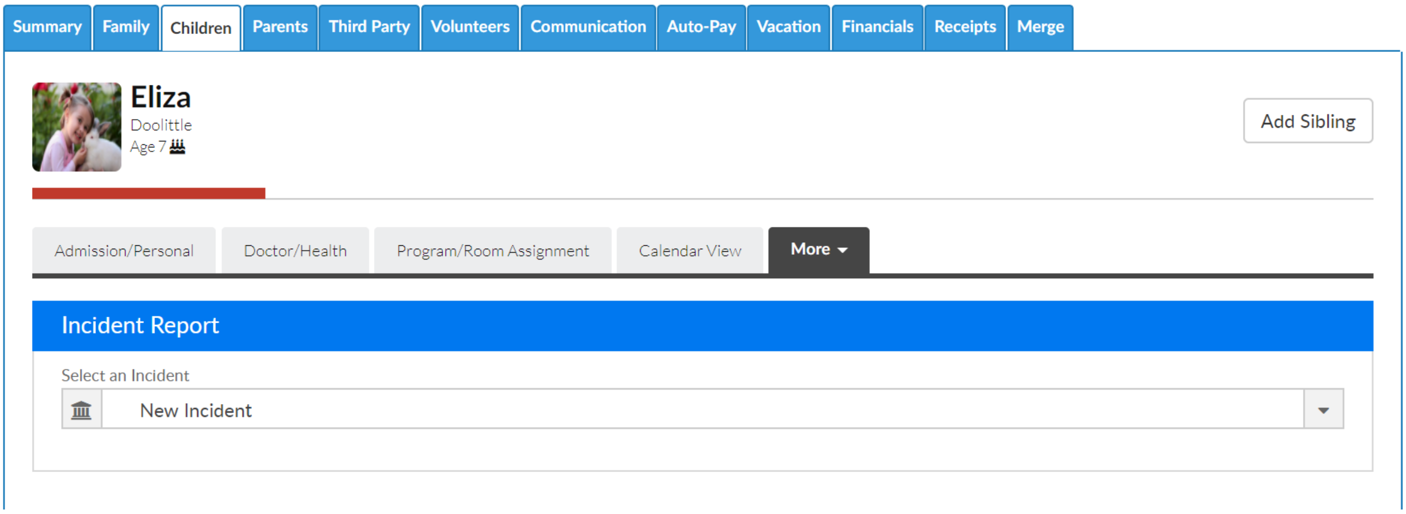


Doolittle Family
Family ID 320241
Internal Note:

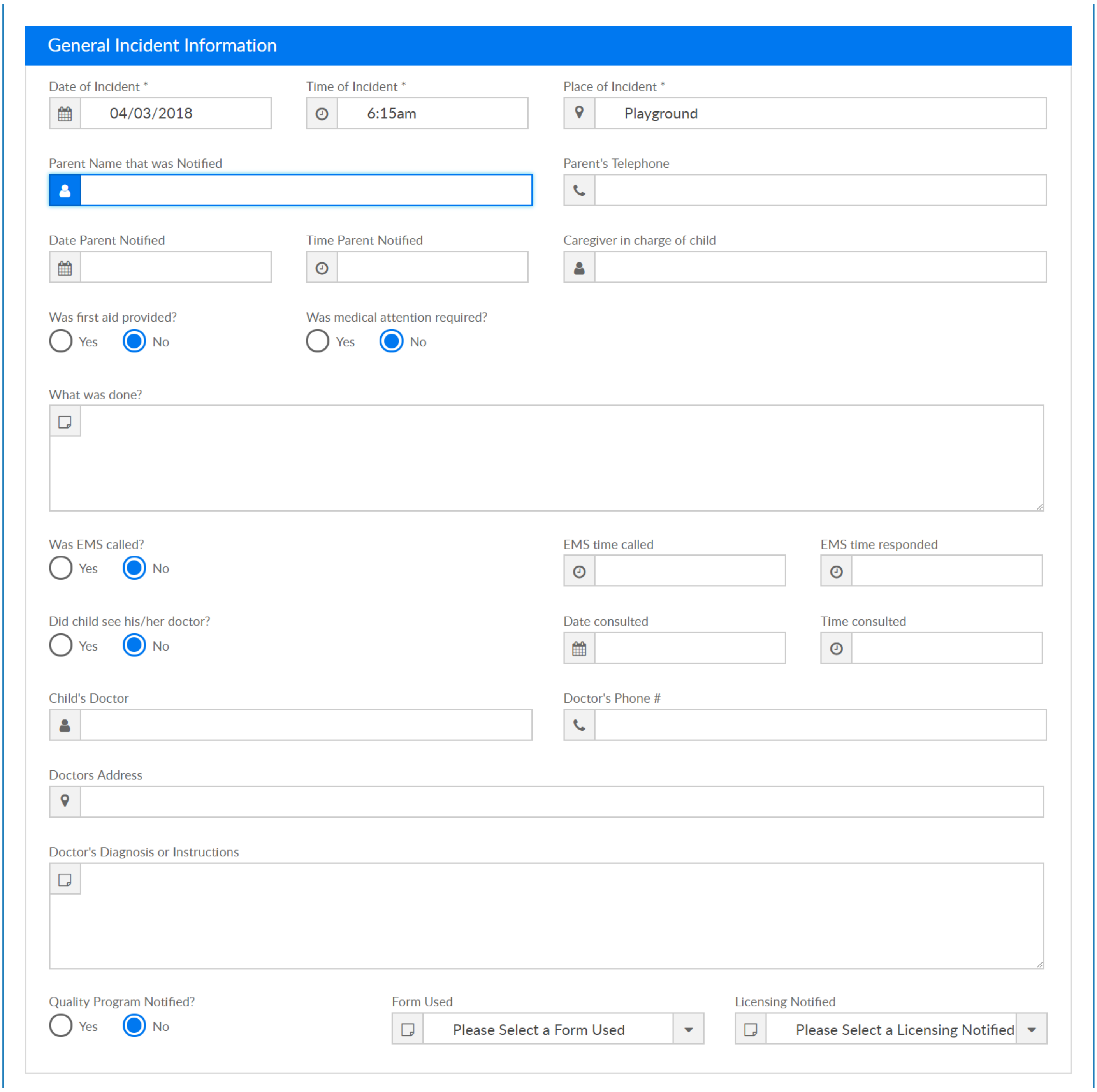
1 Student(s) · Regular Statement Type · 375.00 Balance Outstanding

Active	Classroom	Effective Date	End Date	M	T	W	R	F	Create Date
	AM, Before School Care ~ DCW Transactional- Center 1	04/08/2018	04/14/2018		✓	✓			04/03/2 08:47
	AM, Before School Care ~ DCW Transactional- Center 1	04/15/2018	04/21/2018			✓	✓	✓	04/03/2 08:47
	AM, Before School Care ~ DCW Transactional- Center 1	04/22/2018	04/28/2018		✓	✓	✓		04/03/2 08:47
	AM, Before School Care ~ DCW Transactional- Center 1	04/29/2018	05/05/2018			✓	✓		04/03/2 08:47
	AM, Before School Care ~ DCW Transactional- Center 1	05/06/2018	05/12/2018		✓	✓			04/03/2 08:47

To add a new incident, be sure the new incident option is selected in the Select an Incident field-



Then enter incident detail in each of the following sections. If a field has a * next to it, the field will be required. The rest of the fields should be completed as necessary. Press Save when completed.



General Incident Information

Date of Incident *: 04/03/2018

Time of Incident *: 6:15am

Place of Incident *: Playground

Parent Name that was Notified:

Parent's Telephone:

Date Parent Notified:

Time Parent Notified:

Caregiver in charge of child:

Was first aid provided? ○ Yes ● No

Was medical attention required? ○ Yes ● No

What was done?:

Was EMS called? ○ Yes ● No

EMS time called:

EMS time responded:

Did child see his/her doctor? ○ Yes ● No

Date consulted:

Time consulted:

Child's Doctor:

Doctor's Phone #:

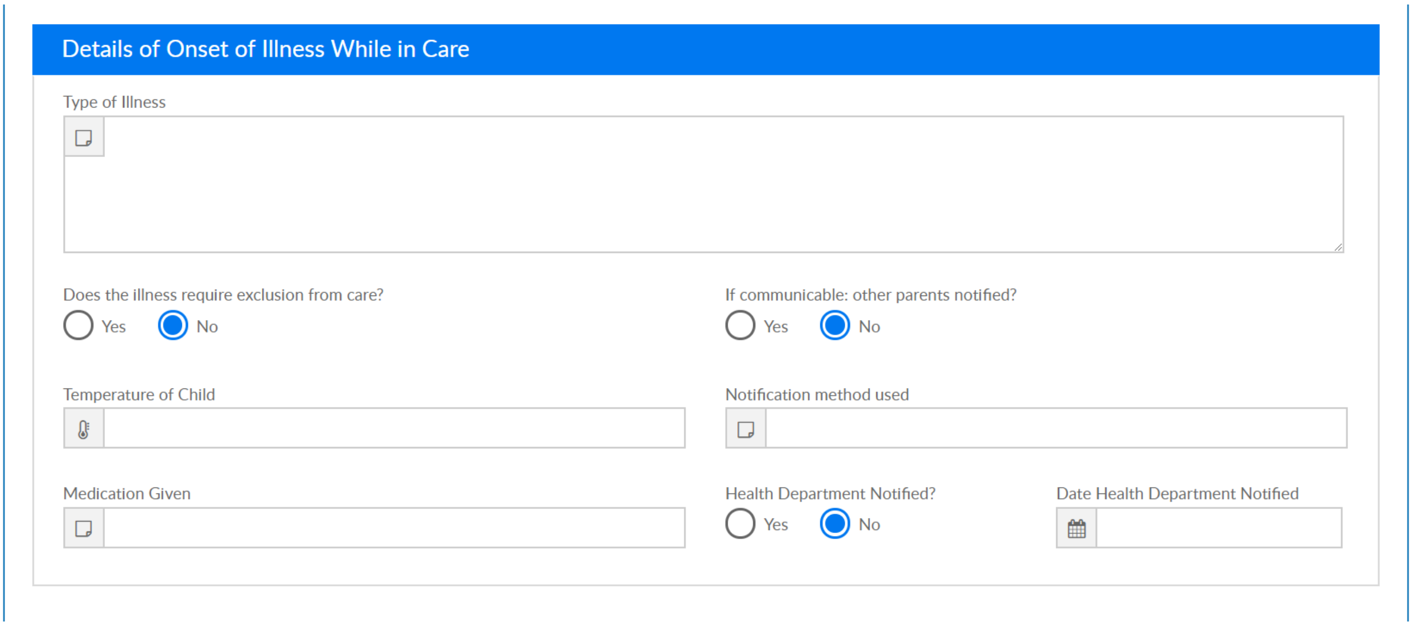
Doctors Address:

Doctor's Diagnosis or Instructions:

Quality Program Notified? ○ Yes ● No

Form Used: Please Select a Form Used ▾

Licensing Notified: Please Select a Licensing Notified ▾



Details of Onset of Illness While in Care

Type of Illness

Does the illness require exclusion from care?
○ Yes ● No

If communicable: other parents notified?
○ Yes ● No

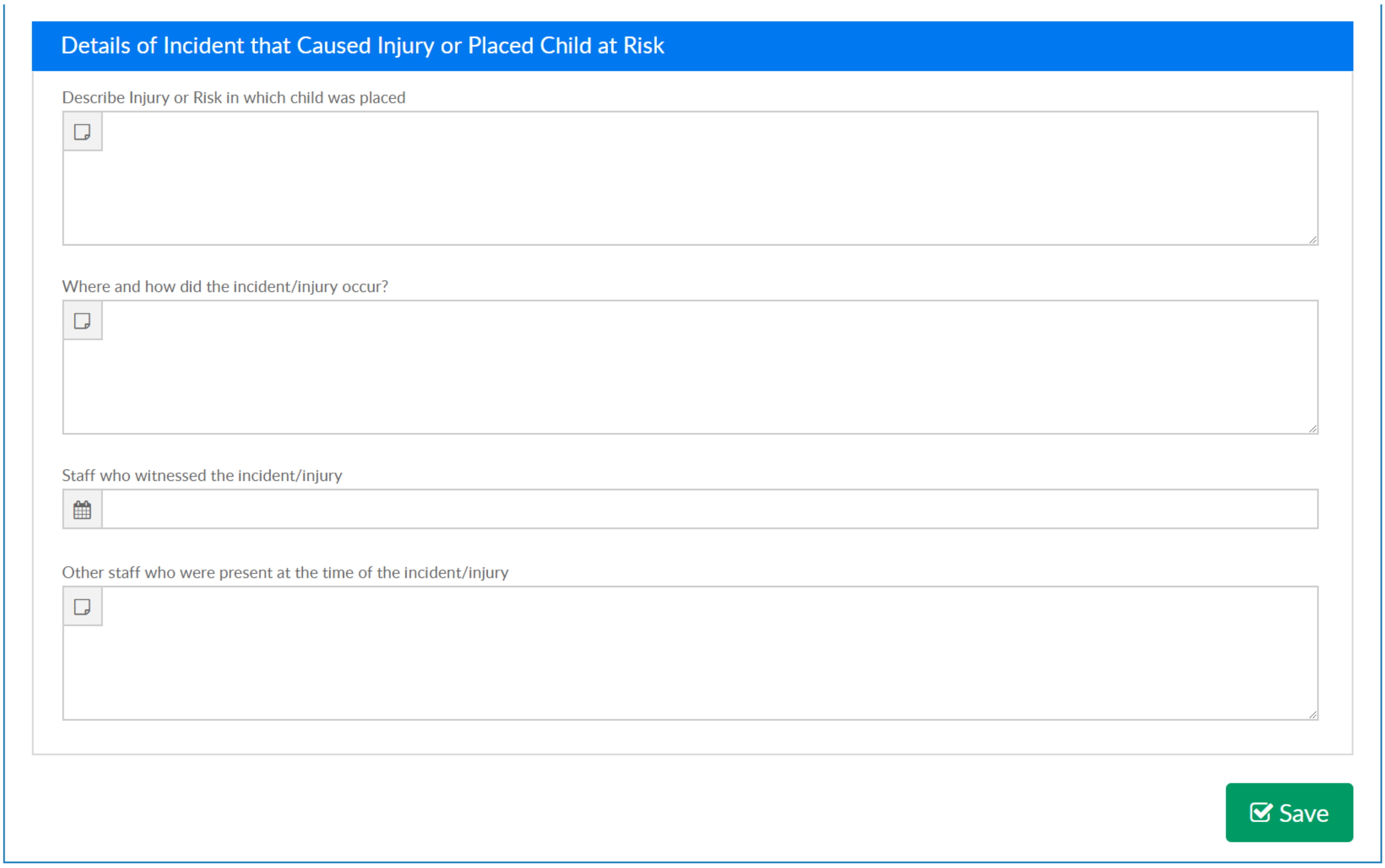
Temperature of Child

Notification method used

Medication Given

Health Department Notified?
○ Yes ● No

Date Health Department Notified



Details of Incident that Caused Injury or Placed Child at Risk

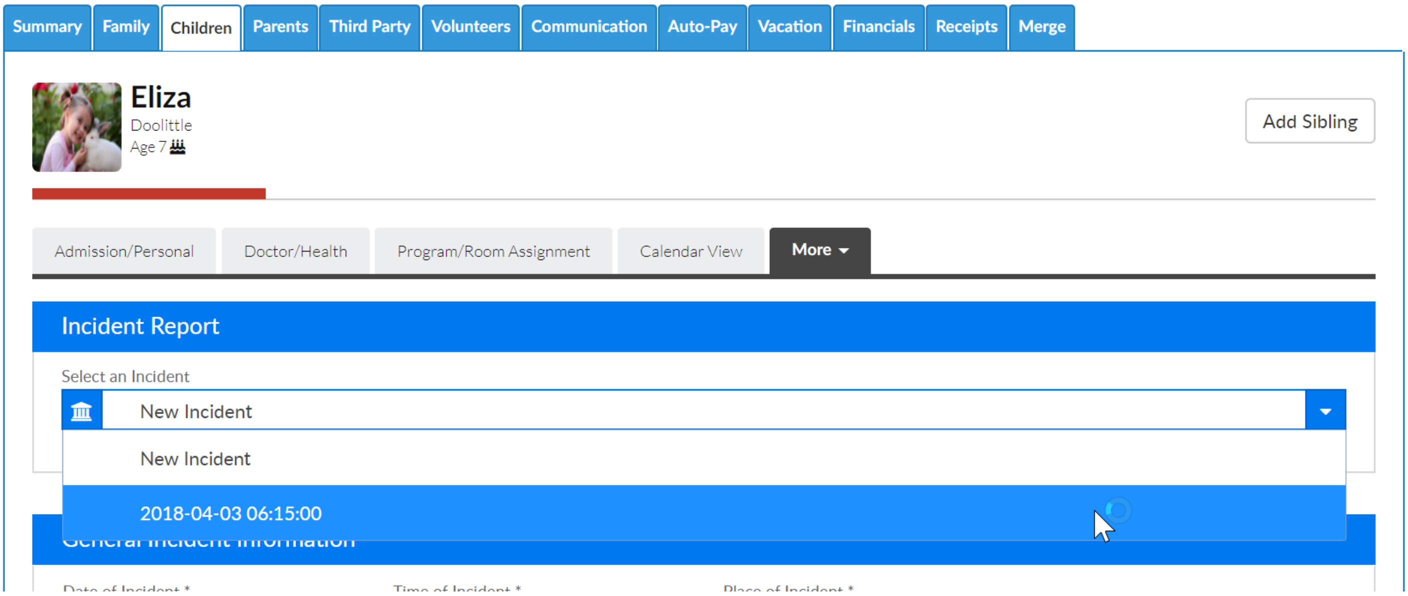
Describe Injury or Risk in which child was placed

Where and how did the incident/injury occur?

Staff who witnessed the incident/injury

Other staff who were present at the time of the incident/injury

Save incidents will display in the incident report drop down list-

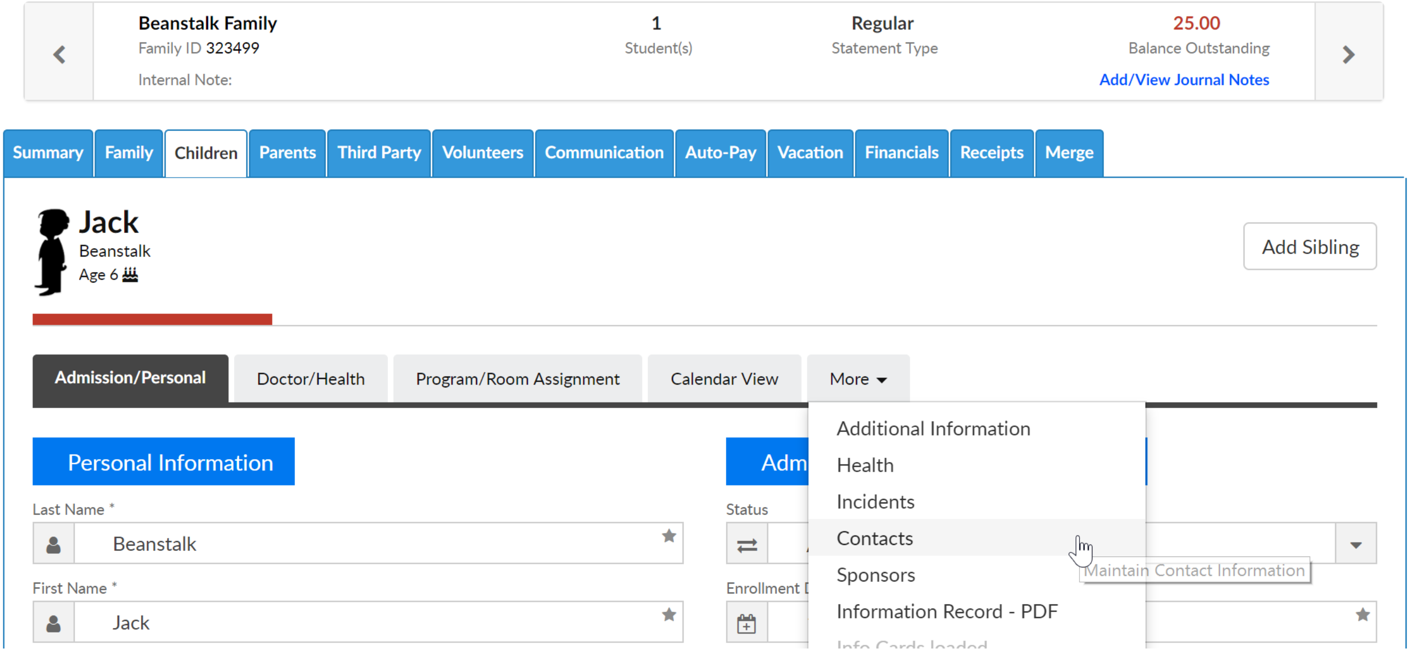

Summary
Family
Children
Parents
Third Party
Volunteers
Communication
Auto-Pay
Vacation
Financials
Receipts
Merge
Eliza
Doolittle
Age 7
Add Sibling
Admission/Personal
Doctor/Health
Program/Room Assignment
Calendar View
More
Incident Report
Select an Incident
New Incident
New Incident
2018-04-03 06:15:00
General Incident Information
Date of Incident *
Time of Incident *
Place of Incident *

Family Record, Child Tab- More, Contacts

Last Modified on 05/10/2018 1:28 pm EDT

To add, edit or deactivate contacts for children/families- go to a family record, then select the child tab.

On the child tab select the More option, then select Contacts.



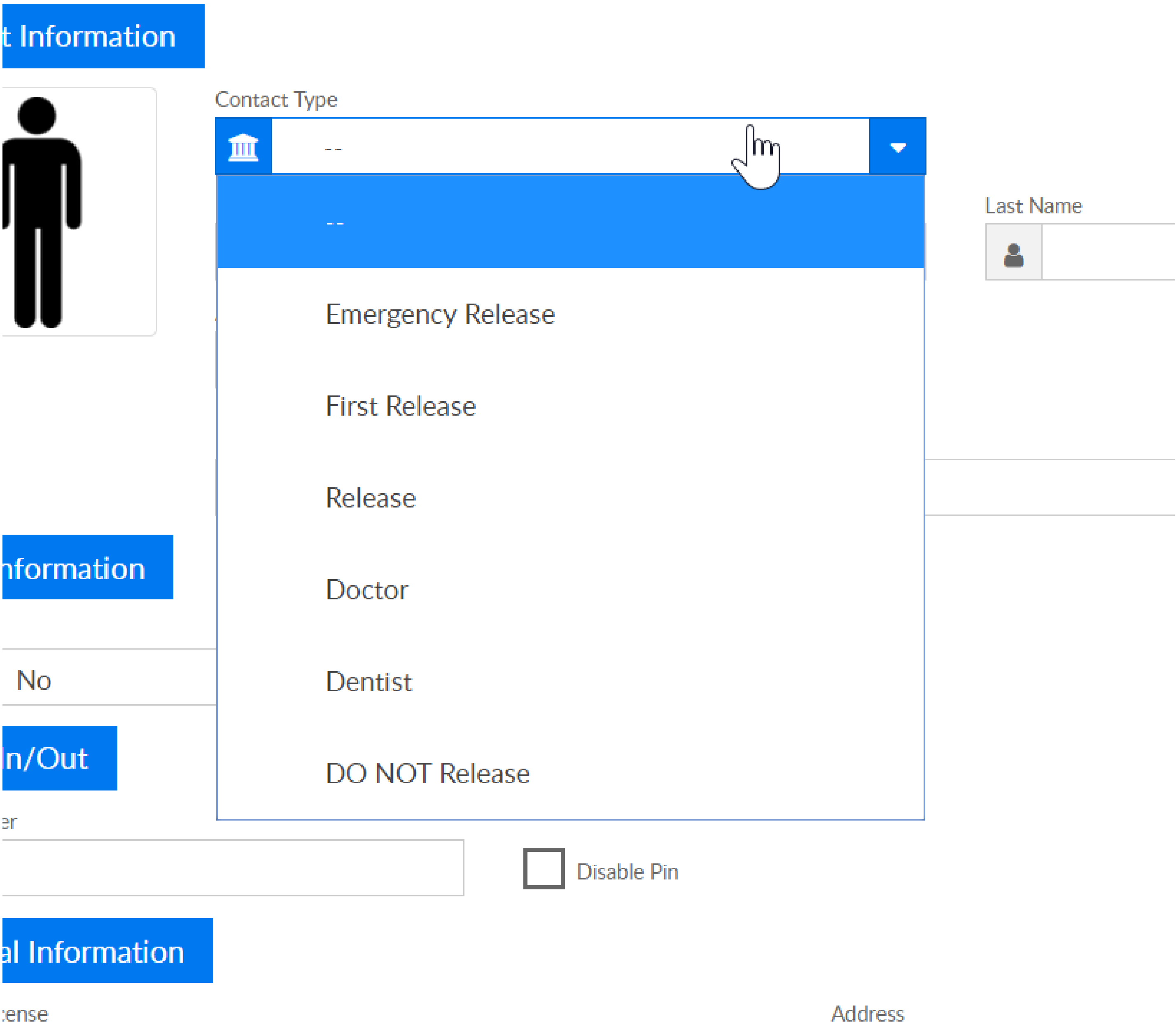
Beanstalk Family
Family ID 323499
Internal Note:
1 Student(s)
Regular Statement Type
25.00 Balance Outstanding

Jack
Beanstalk
Age 6

Last Name * Beanstalk
First Name * Jack

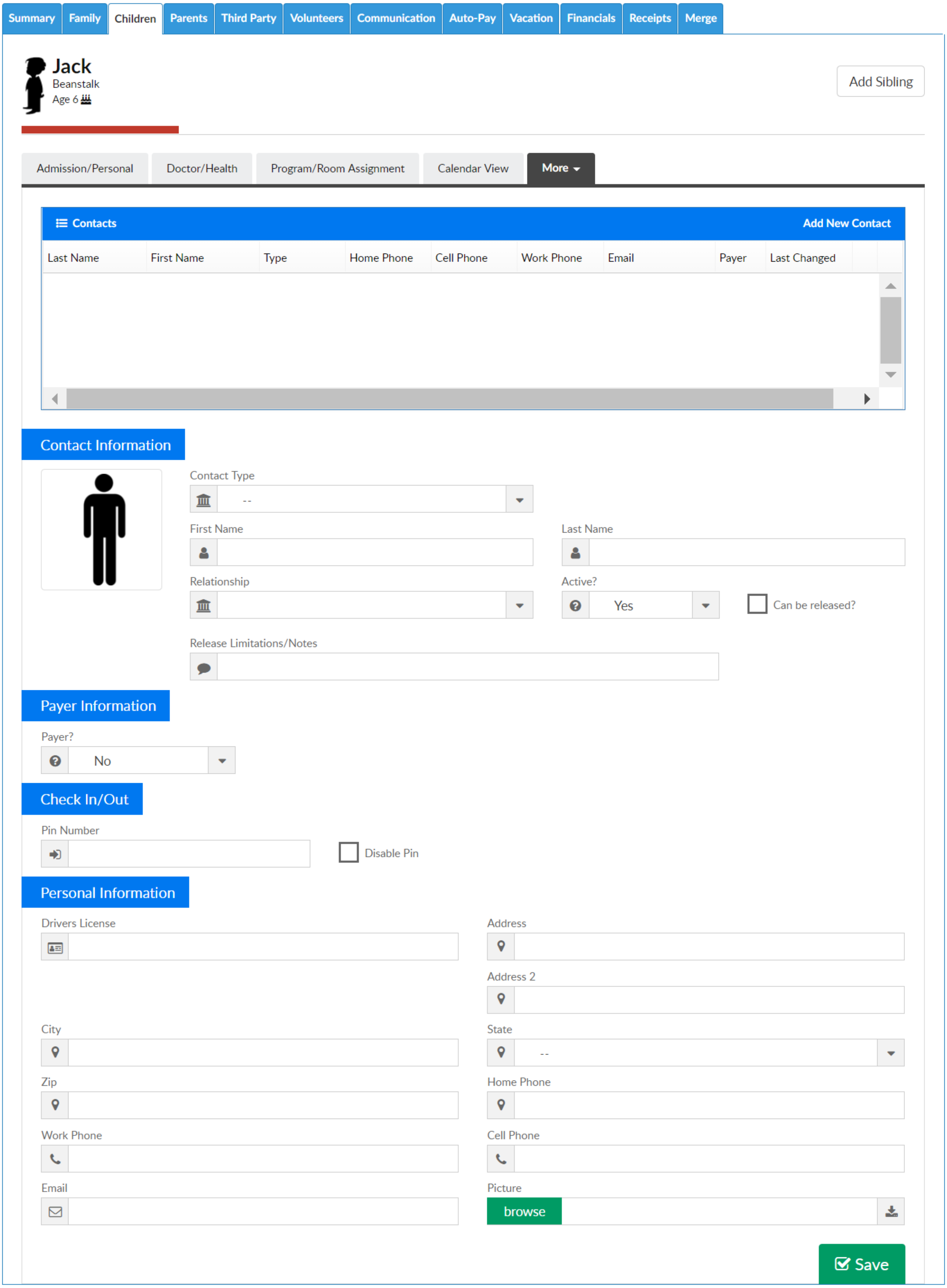
To add a new contact enter the contact's details in the blank fields then press Save. The available fields are listed below-

- Contact Type- this section helps to classify what type of contact is being entered, this is a required field (options cannot be removed from the selection list)
    - Emergency Release
    - First Release
    - Doctor
    - Dentist
    - DO NOT Release



- First Name
- Last Name
- Relationship- the values here will populate based on the Relationship type valid values that are setup under Setup > System Config, Valid Values
- Active
    - Can be Released? check this box if the contact can pick up the child
- Release Limitations/Notes
- Payer- if the contact can pay on the account or not, if this is marked as yes, then a username and password will display once the contact is saved. If yes is selected an email is required.
    - Yes

    - No
- PIN Number- the contact's PIN number will display once the contact is saved
    - Disable PIN
- Drivers License
- Address
- Address 2
- City
- State
- Zip
- Home Phone
- Work Phone
- Cell Phone
- Email
- Picture



Jack
Beanstalk
Age 6

Last Name	First Name	Type	Home Phone	Cell Phone	Work Phone	Email	Payer	Last Changed

Contact Information

Contact Type: --

First Name:

Last Name:

Relationship:

Active?: Yes

☐ Can be released?

Release Limitations/Notes:

Payer Information

Payer?: No

Check In/Out

Pin Number:

☐ Disable Pin

Personal Information

Drivers License:

Address:

Address 2:

City:

State: --

Zip:

Home Phone:

Work Phone:

Cell Phone:

Email:

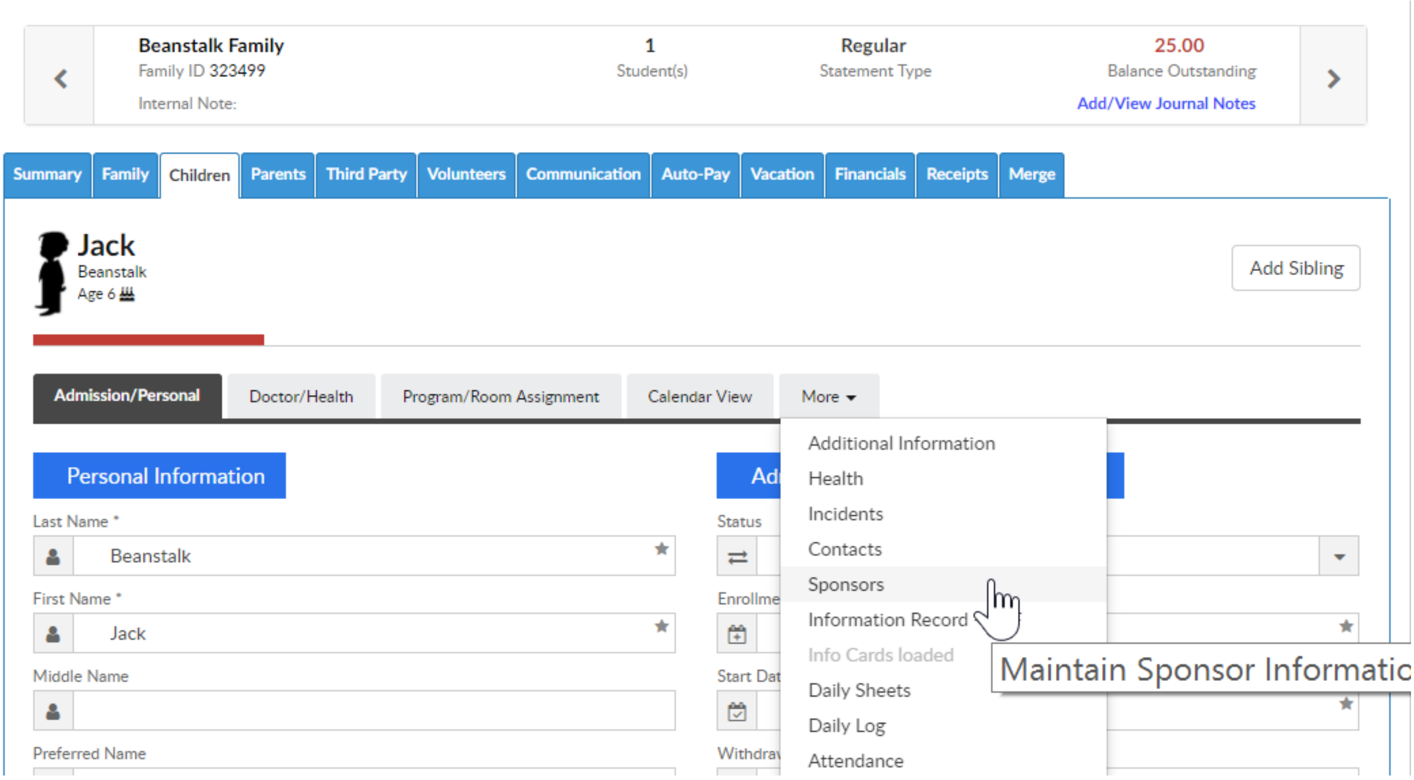
Picture:

Family Record, Child Tab- More, Sponsors

Last Modified on 01/19/2018 3:38 pm EST

The Sponsors tab on the More drop down list links users to the Third Party Screen of the family record.

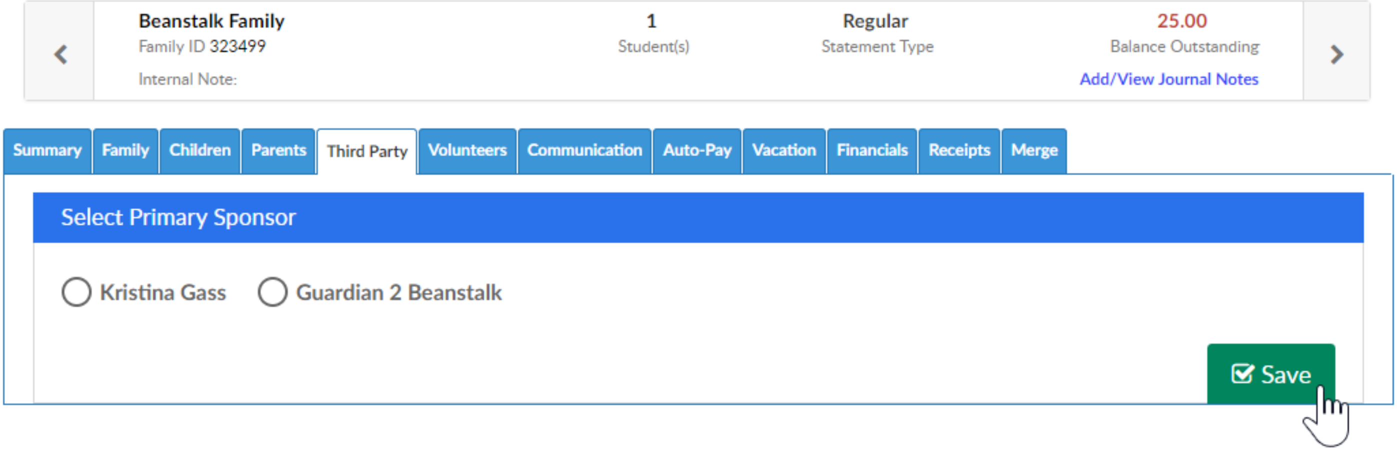
From the family record, select the Children tab. Then select the More drop down box and select Sponsors.


Beanstalk Family
Family ID 323499
Internal Note:
1 Student(s)
Regular Statement Type
25.00 Balance Outstanding

Jack
Beanstalk
Age 6

Last Name *: Beanstalk
First Name *: Jack
Middle Name:
Preferred Name:

On this screen users can split a divorced family or add a third party sponsor as a payor.


Beanstalk Family
Family ID 323499
Internal Note:
1 Student(s)
Regular Statement Type
25.00 Balance Outstanding

Select Primary Sponsor

○ Kristina Gass ○ Guardian 2 Beanstalk

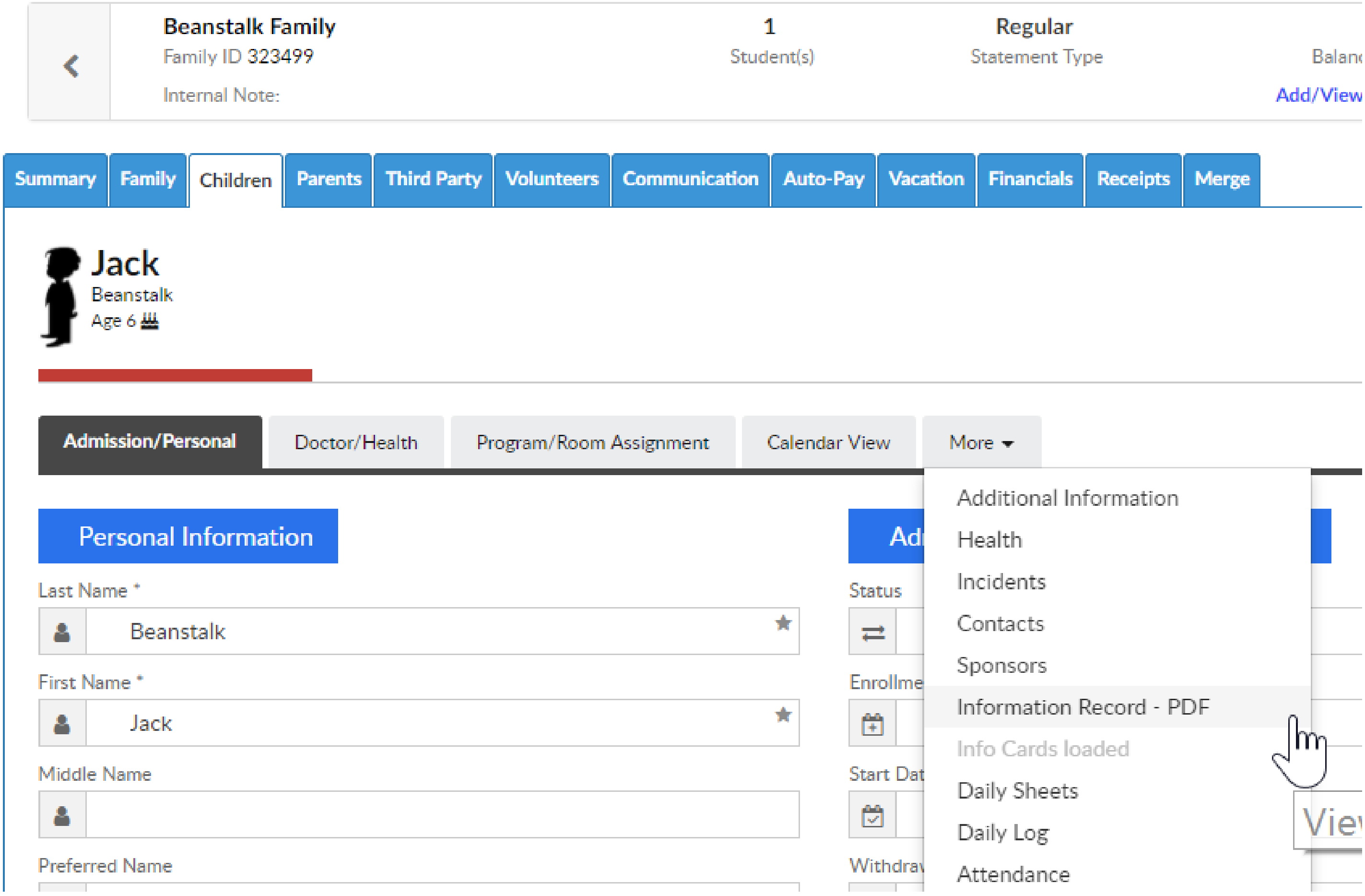
Click here for directions on how to use the Third Party screen.

Family Record, Child Tab- More, Information Record- PDF

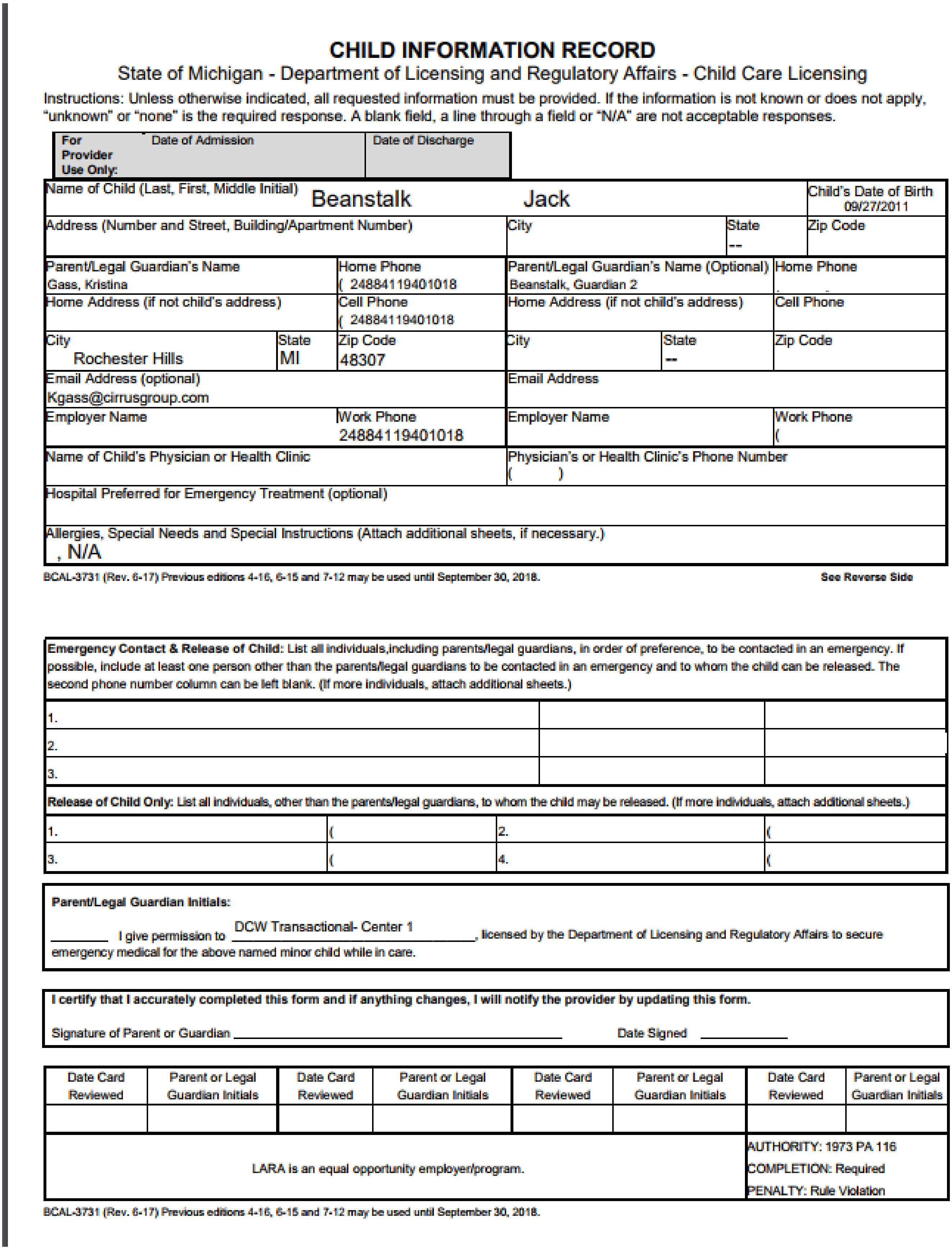
Last Modified on 03/14/2018 9:18 am EDT

Information Record cards are typically state or site defined forms, when selected mapped data for the selected child will print on the form.

From the family record, selecct the Children tab. Then select the More drop down box and select Information Record- PDF, if a site has site specific forms mapped Information Record 1, 2, 3 etc will display below.



Once the PDF has been downloaded and saved, the file will open and will display required child informtion.



CHILD INFORMATION RECORD

State of Michigan - Department of Licensing and Regulatory Affairs - Child Care Licensing

Instructions: Unless otherwise indicated, all requested information must be provided. If the information is not known or does not apply, "unknown" or "none" is the required response. A blank field, a line through a field or "N/A" are not acceptable responses.

For Provider Use Only:	Date of Admission	Date of Discharge

Name of Child (Last, First, Middle Initial) Beanstalk Jack			Child's Date of Birth 09/27/2011
Address (Number and Street, Building/Apartment Number)	City	State --	Zip Code

Parent/Legal Guardian's Name Gass, Kristina	Home Phone (24884119401018	Parent/Legal Guardian's Name (Optional) Beanstalk, Guardian 2	Home Phone
Home Address (if not child's address)	Cell Phone (24884119401018	Home Address (if not child's address)	Cell Phone
City Rochester Hills / State MI	Zip Code 48307	City / State --	Zip Code
Email Address (optional) Kgass@cirrusgroup.com		Email Address	
Employer Name	Work Phone 24884119401018	Employer Name	Work Phone (
Name of Child's Physician or Health Clinic		Physician's or Health Clinic's Phone Number ( )	
Hospital Preferred for Emergency Treatment (optional)			
Allergies, Special Needs and Special Instructions (Attach additional sheets, if necessary.) , N/A			

BCAL-3731 (Rev. 6-17) Previous editions 4-16, 6-15 and 7-12 may be used until September 30, 2018. **See Reverse Side**

Emergency Contact & Release of Child: List all individuals,including parents/legal guardians, in order of preference, to be contacted in an emergency. If possible, include at least one person other than the parents/legal guardians to be contacted in an emergency and to whom the child can be released. The second phone number column can be left blank. (If more individuals, attach additional sheets.)

1.		
2.		
3.		

Release of Child Only: List all individuals, other than the parents/legal guardians, to whom the child may be released. (If more individuals, attach additional sheets.)

1.	(	2.	(
3.	(	4.	(

Parent/Legal Guardian Initials:

________ I give permission to DCW Transactional- Center 1, licensed by the Department of Licensing and Regulatory Affairs to secure emergency medical for the above named minor child while in care.

I certify that I accurately completed this form and if anything changes, I will notify the provider by updating this form.

Signature of Parent or Guardian ______________________ Date Signed ________

Date Card Reviewed	Parent or Legal Guardian Initials	Date Card Reviewed	Parent or Legal Guardian Initials	Date Card Reviewed	Parent or Legal Guardian Initials	Date Card Reviewed	Parent or Legal Guardian Initials

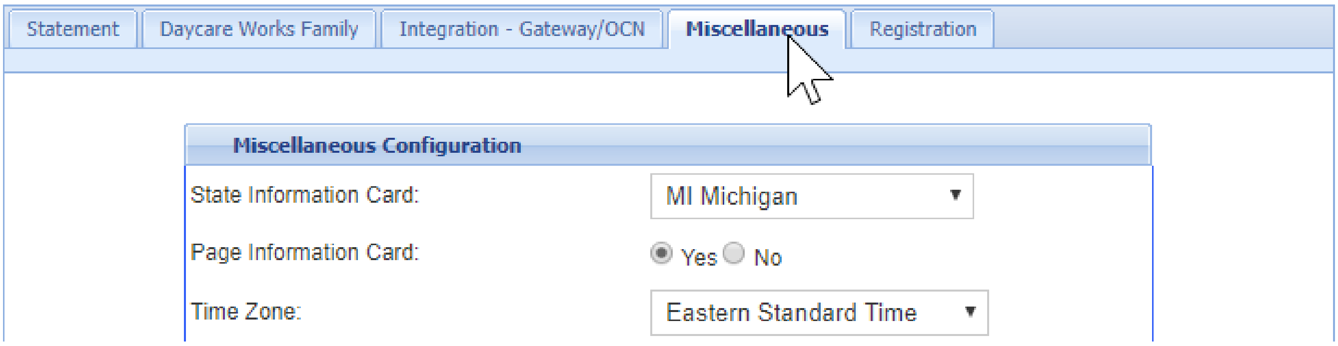
LARA is an equal opportunity employer/program.

AUTHORITY: 1973 PA 116
COMPLETION: Required
PENALTY: Rule Violation

BCAL-3731 (Rev. 6-17) Previous editions 4-16, 6-15 and 7-12 may be used until September 30, 2018.

The state that displays as a default will be associated to the state selected on the setup > system config, General Config screen under the Miscellaneous tab-

Setup -> *System Config* -> General Configuration



Miscellaneous Configuration

State Information Card: MI Michigan

Page Information Card: ● Yes ○ No

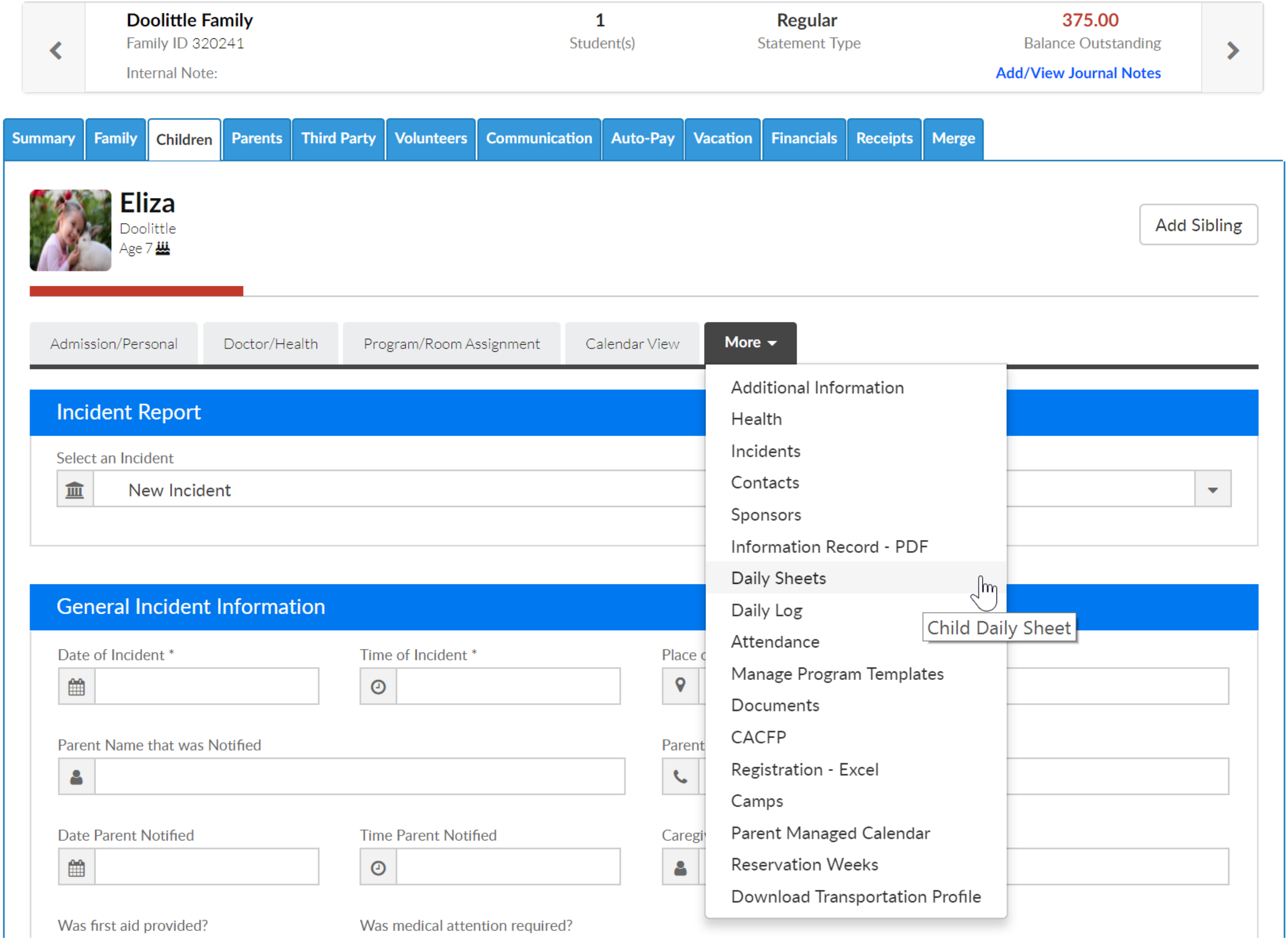
Time Zone: Eastern Standard Time

Family Record, Child Tab- More, Daily Sheets

Last Modified on 04/03/2018 10:03 am EDT

The Daily sheet section on the child record displays daily insites that have been added for children and also allows staff/admin to add individual insites.

From the child record, select the more tab- then select Daily Sheets.



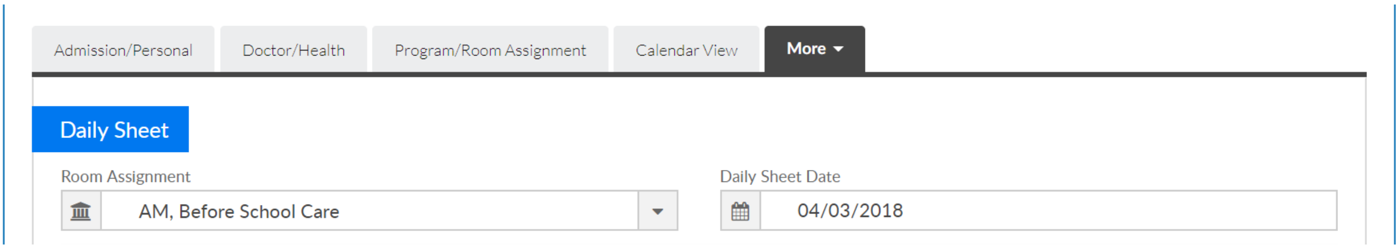
Doolittle Family
Family ID 320241
Internal Note:
1 Student(s)
Regular Statement Type
375.00 Balance Outstanding

Eliza
Doolittle
Age 7

Select an Incident: New Incident

In order for detail to display the child must be attached to a program/room that has a daily sheet added.

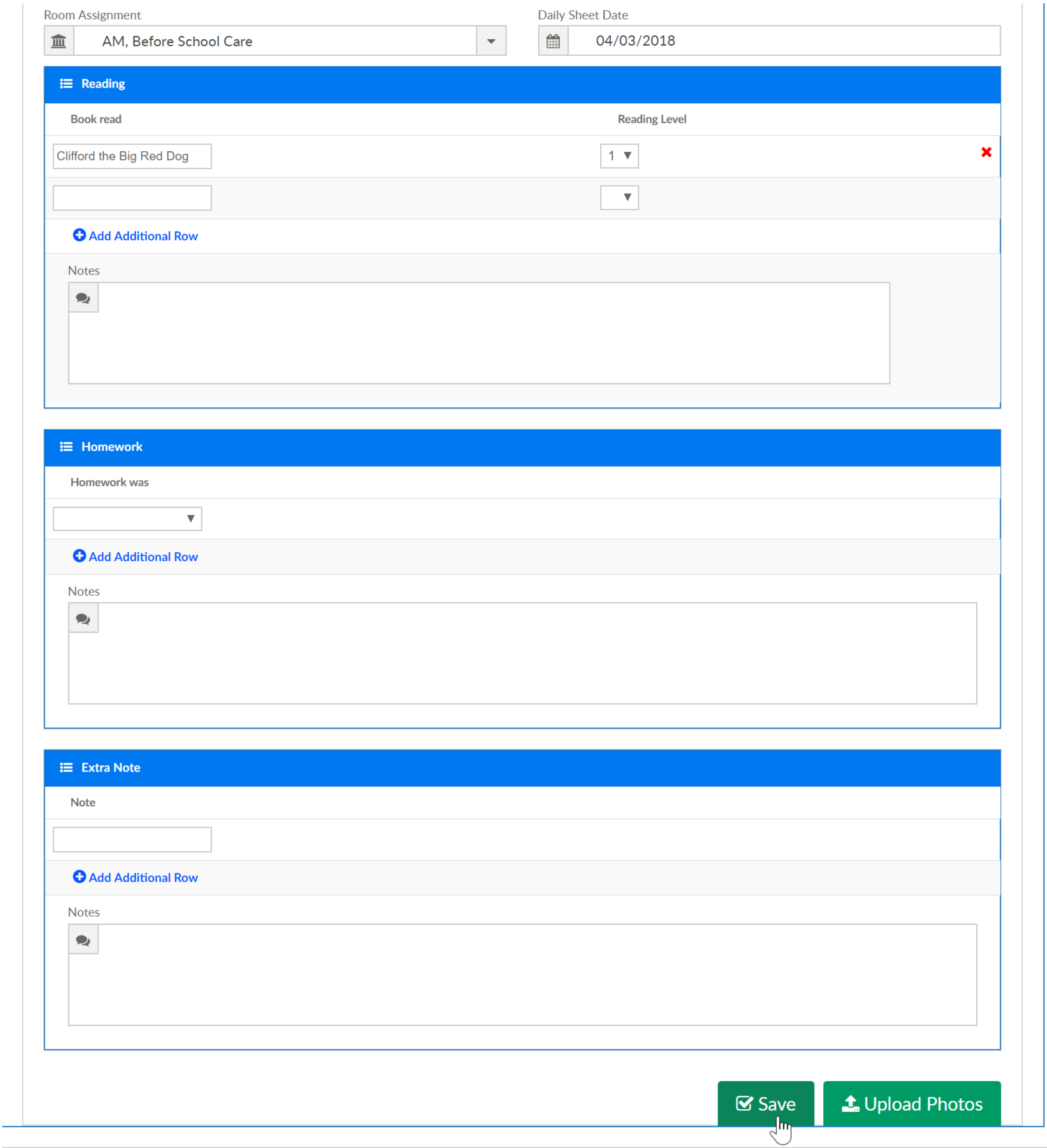
Categories and attributes will display according o the room that is selected in the Room Assignment field.



Room Assignment: AM, Before School Care

Daily Sheet Date: 04/03/2018

If insites were added they would display in each section. To add a new insite go to the category and start completing the fields. Then scroll to the bottom of the page and save.



Room Assignment: AM, Before School Care

Daily Sheet Date: 04/03/2018

Book read	Reading Level
Clifford the Big Red Dog	1

Homework was

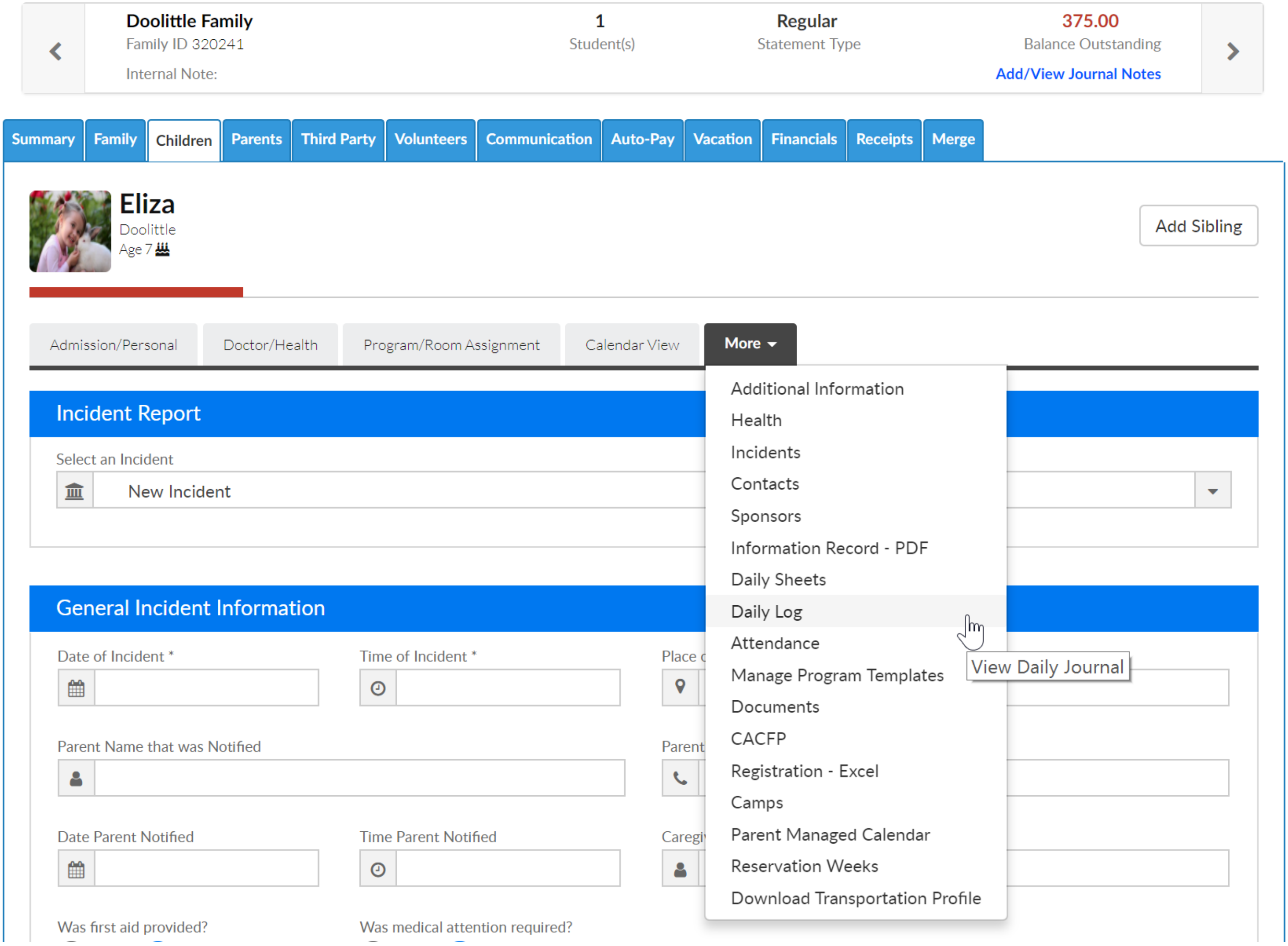
Note

Family Record, Child Tab- More, Daily Log

Last Modified on 05/23/2018 8:43 am EDT

The Daily Log section allows users to view and add notes for a specific family.

From the Child screen, select the More tab, then select Daily Log-



Doolittle Family
Family ID 320241
Internal Note:

1
Student(s)

Regular
Statement Type

375.00
Balance Outstanding

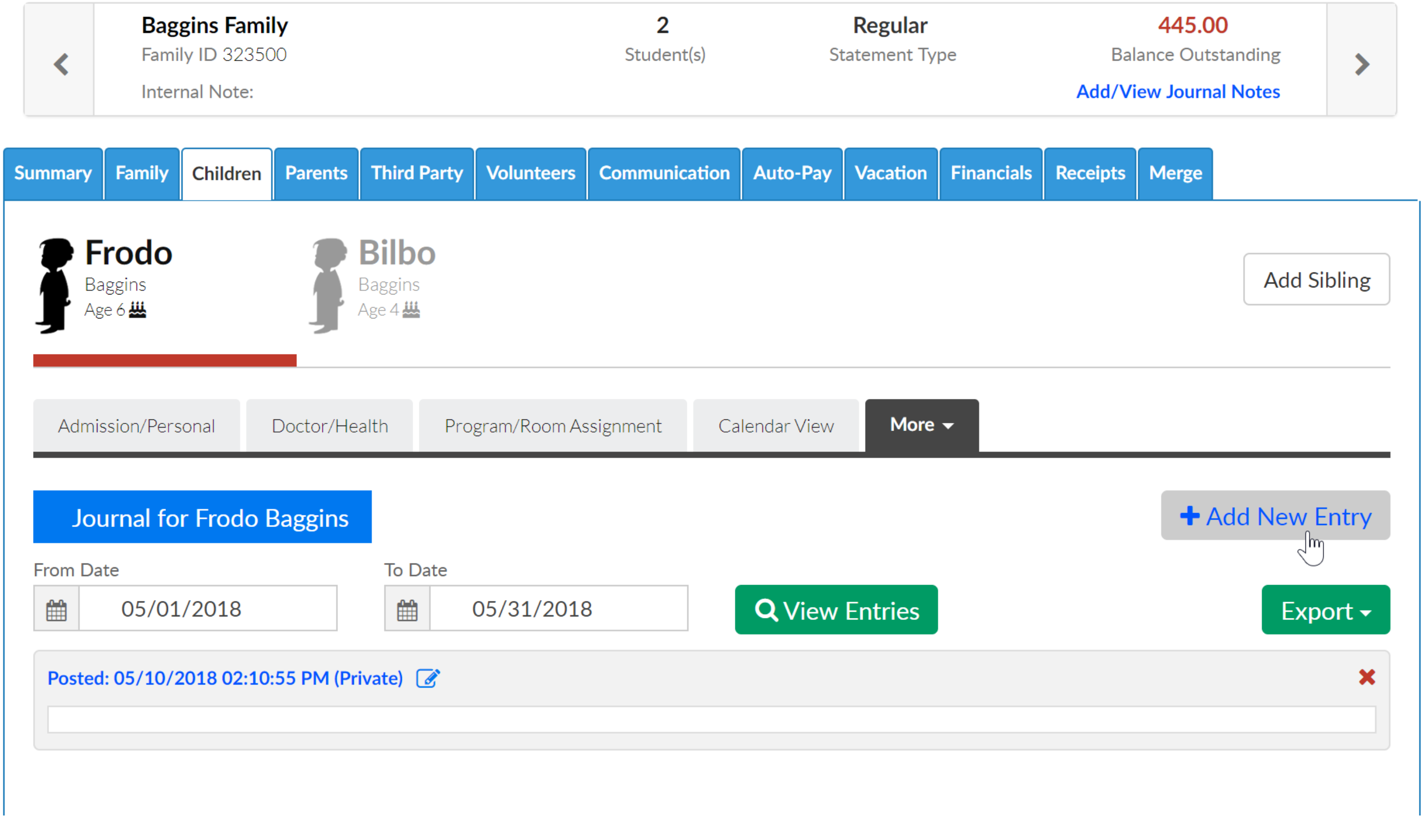
Eliza
Doolittle
Age 7

Incident Report

Select an Incident: New Incident

General Incident Information

To add a new entry, select the Add New Entry button.



Baggins Family
Family ID 323500
Internal Note:

2 Student(s)

Regular Statement Type

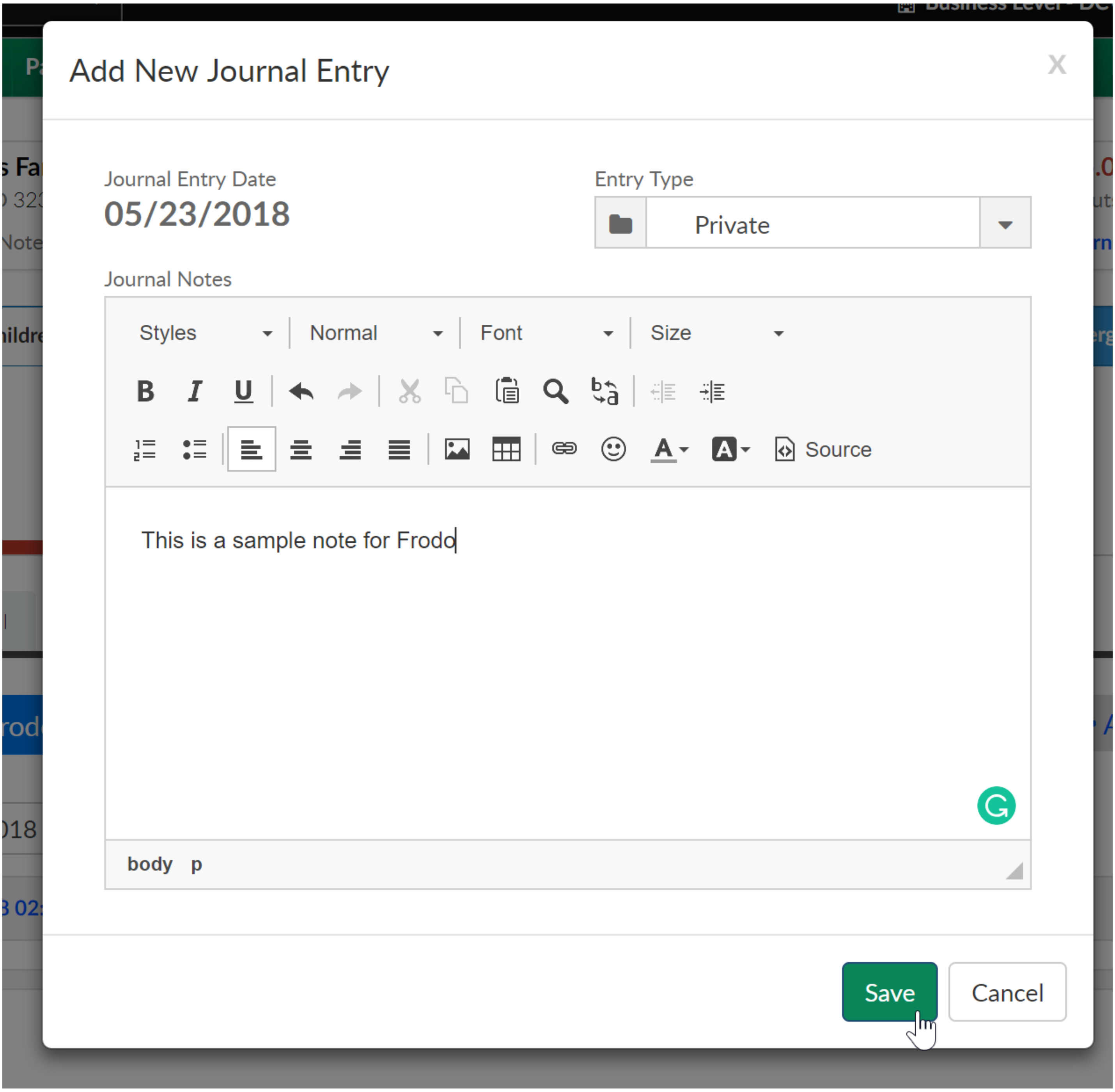
445.00 Balance Outstanding

From Date 05/01/2018

To Date 05/31/2018

Posted: 05/10/2018 02:10:55 PM (Private)

Select the Entry type, then type the note into the Journal Notes section. Press Save when complete.



Add New Journal Entry

Journal Entry Date
05/23/2018

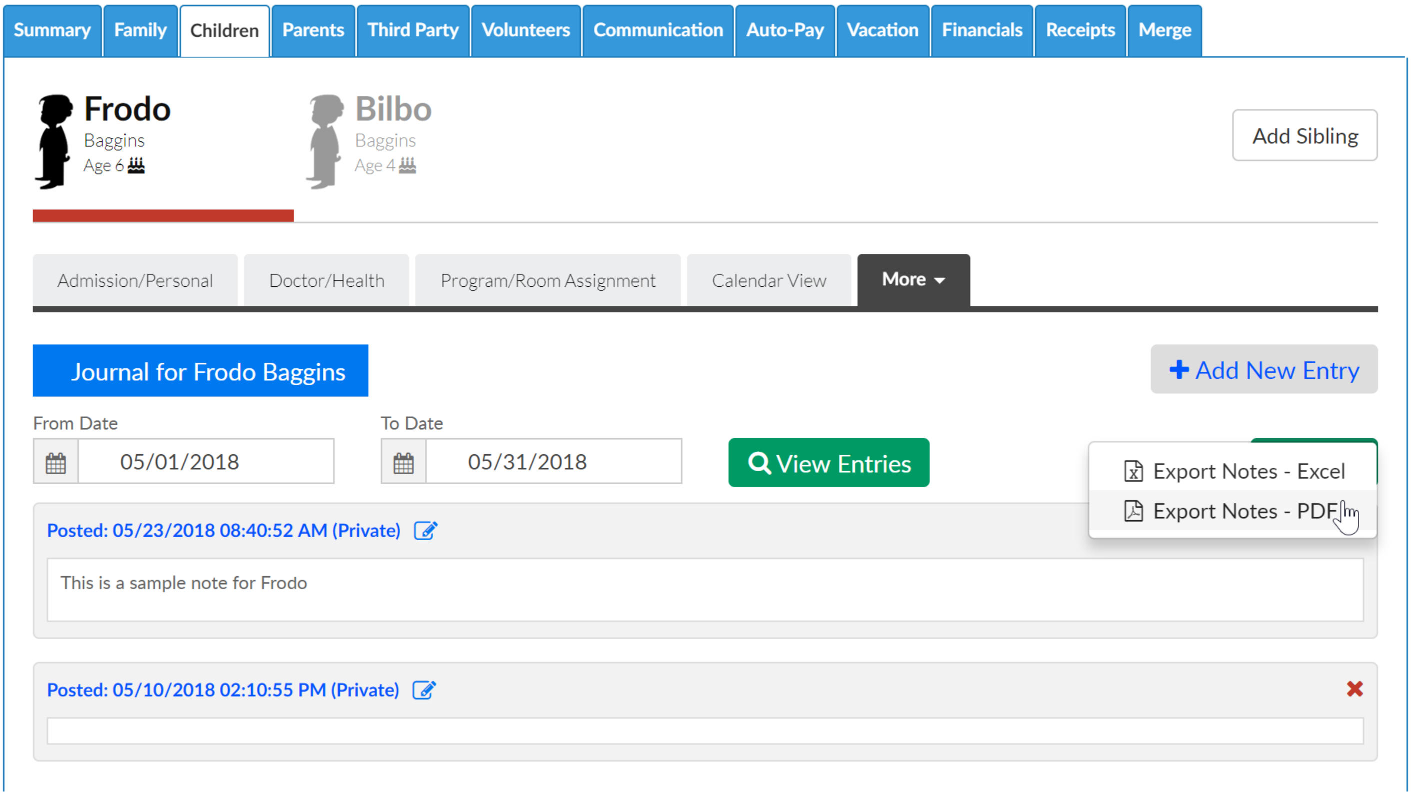
Entry Type
Private

Journal Notes

This is a sample note for Frodo

Use the From and To Date fields to change the time period notes are viewable.

To export notes go to the actions button and select Export Notes- Excel or Export Notes- PDF.



Journal for Frodo Baggins

From Date: 05/01/2018

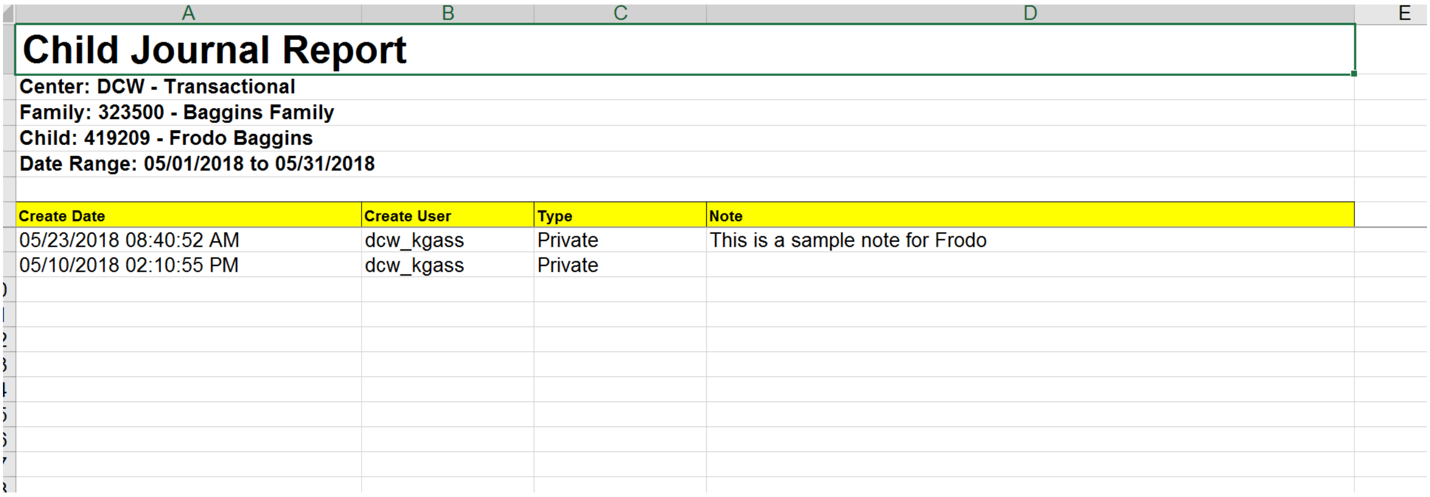
To Date: 05/31/2018

Posted: 05/23/2018 08:40:52 AM (Private)

This is a sample note for Frodo

Posted: 05/10/2018 02:10:55 PM (Private)

Export Notes- Excel

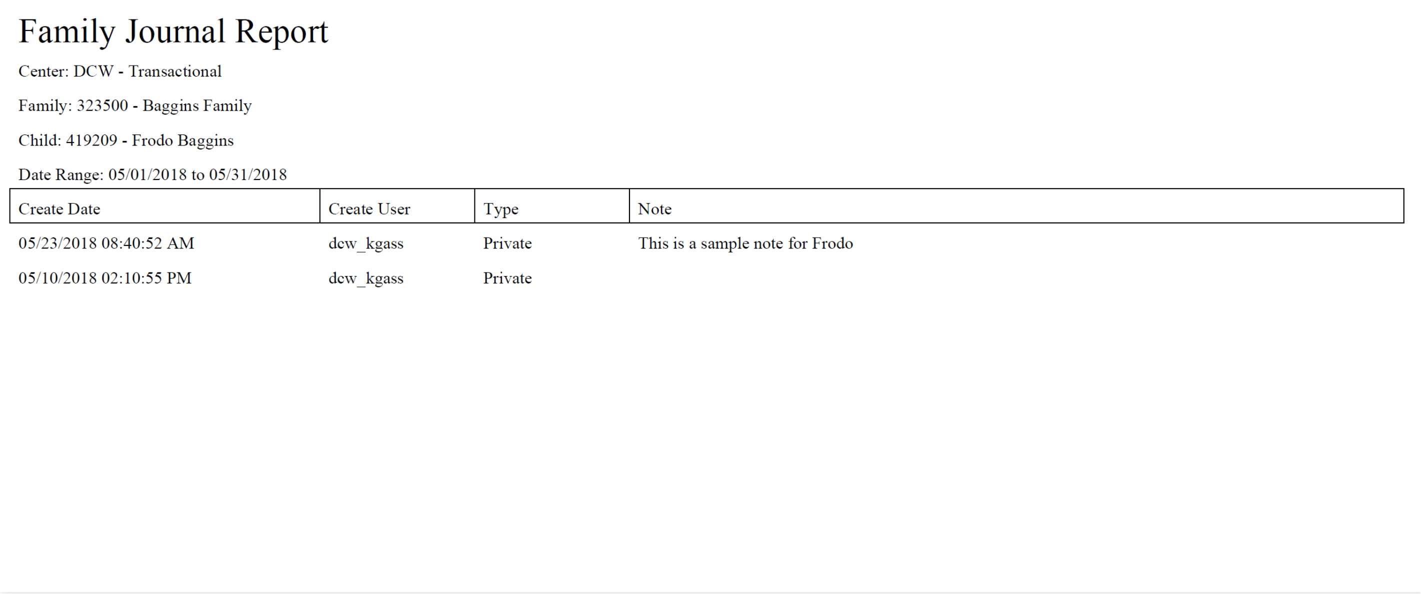


Child Journal Report

Center: DCW - Transactional
Family: 323500 - Baggins Family
Child: 419209 - Frodo Baggins
Date Range: 05/01/2018 to 05/31/2018

Create Date	Create User	Type	Note
05/23/2018 08:40:52 AM	dcw_kgass	Private	This is a sample note for Frodo
05/10/2018 02:10:55 PM	dcw_kgass	Private	

Export Notes- PDF



Family Journal Report

Center: DCW - Transactional

Family: 323500 - Baggins Family

Child: 419209 - Frodo Baggins

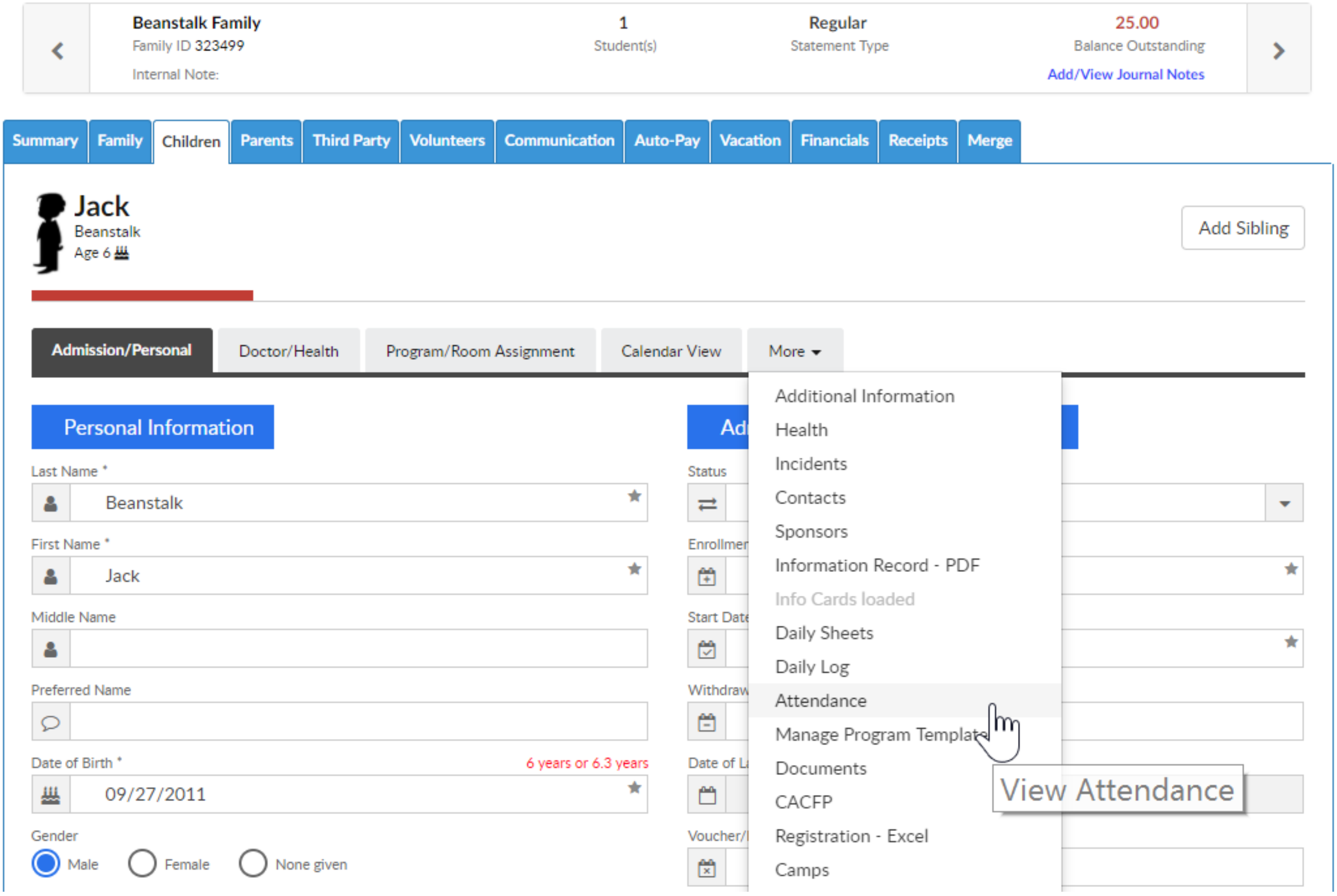
Date Range: 05/01/2018 to 05/31/2018

Create Date	Create User	Type	Note
05/23/2018 08:40:52 AM	dcw_kgass	Private	This is a sample note for Frodo
05/10/2018 02:10:55 PM	dcw_kgass	Private	

Family Record, Child Tab- More, Attendance

Last Modified on 03/12/2018 7:50 am EDT

From the family record, select the child tab. On the child tab the More option will display in a tabbed menu- select the menu, then select the Attendance option.



Beanstalk Family
Family ID 323499
Internal Note:

1 Student(s)

Regular Statement Type

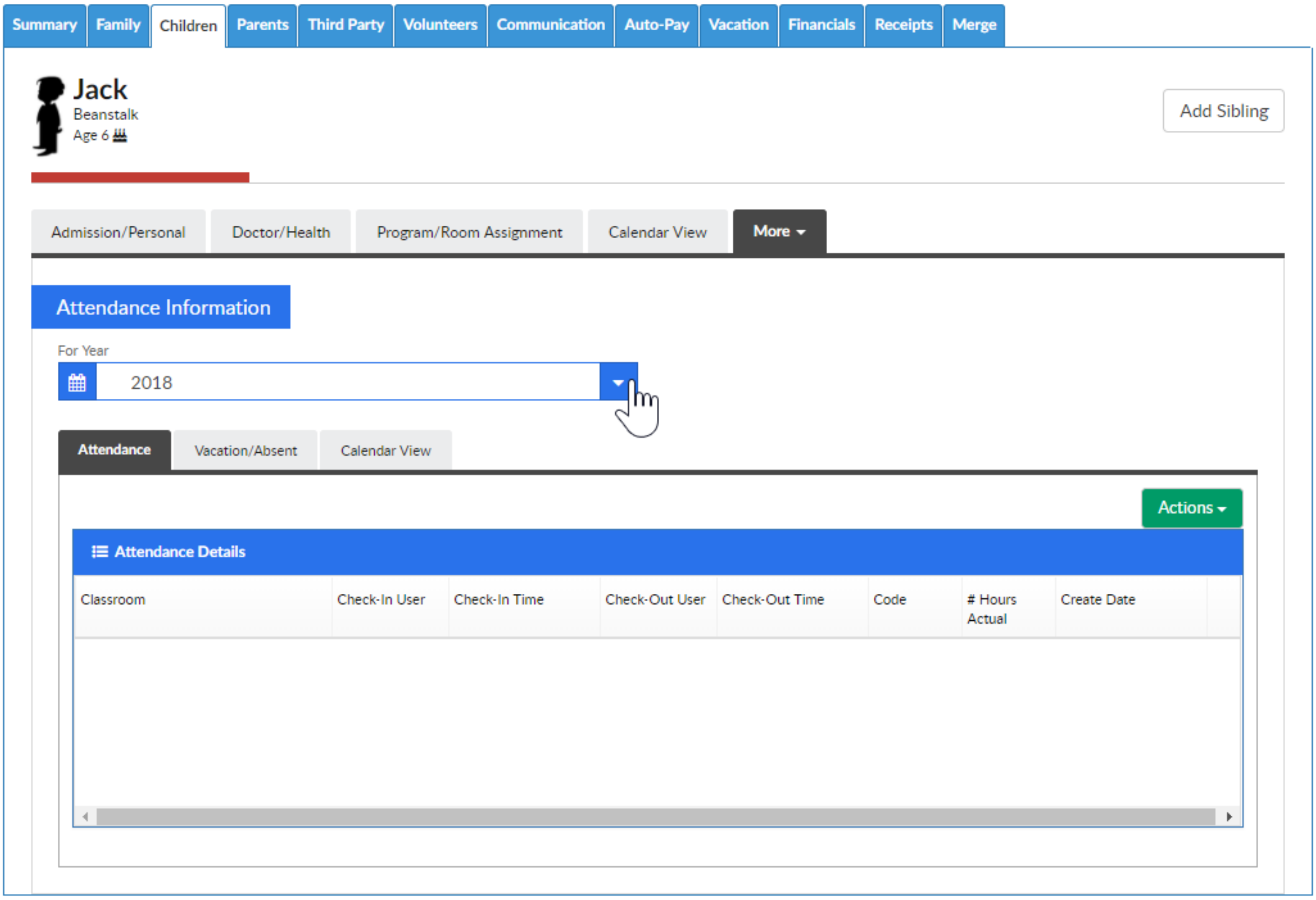
25.00 Balance Outstanding

Jack
Beanstalk
Age 6

Personal Information

Last Name *: Beanstalk
First Name *: Jack
Middle Name:
Preferred Name:
Date of Birth *: 09/27/2011 (6 years or 6.3 years)
Gender: ● Male ○ Female ○ None given

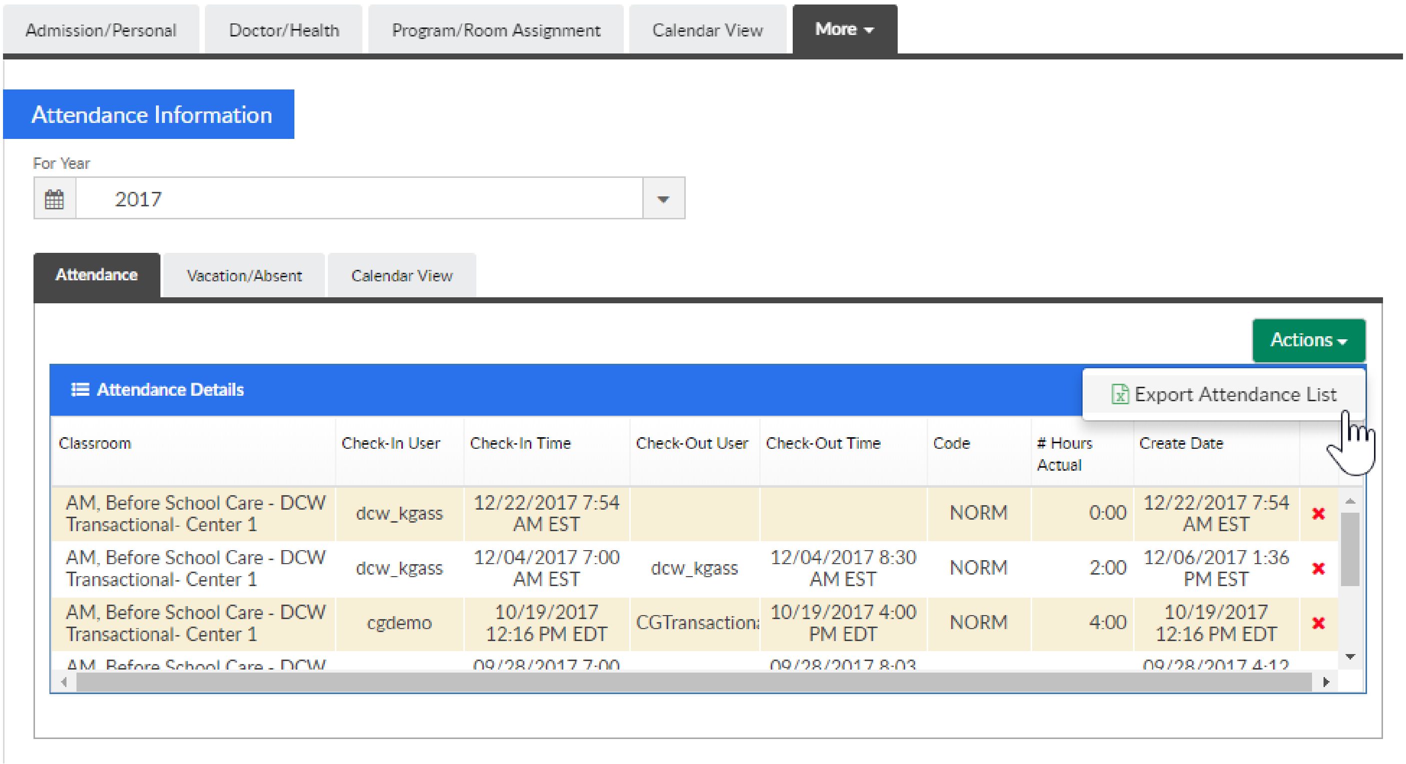
On the attendance screen, users can toggle between year by selecting the drop down menu in the For Year field.



For Year: 2018

Classroom	Check-In User	Check-In Time	Check-Out User	Check-Out Time	Code	# Hours Actual	Create Date

Once data displays select the Actions menu for export options.



For Year: 2017

Classroom	Check-In User	Check-In Time	Check-Out User	Check-Out Time	Code	# Hours Actual	Create Date	
AM, Before School Care - DCW Transactional- Center 1	dcw_kgass	12/22/2017 7:54 AM EST			NORM	0:00	12/22/2017 7:54 AM EST	✖
AM, Before School Care - DCW Transactional- Center 1	dcw_kgass	12/04/2017 7:00 AM EST	dcw_kgass	12/04/2017 8:30 AM EST	NORM	2:00	12/06/2017 1:36 PM EST	✖
AM, Before School Care - DCW Transactional- Center 1	cgdemo	10/19/2017 12:16 PM EDT	CGTransaction:	10/19/2017 4:00 PM EDT	NORM	4:00	10/19/2017 12:16 PM EDT	✖

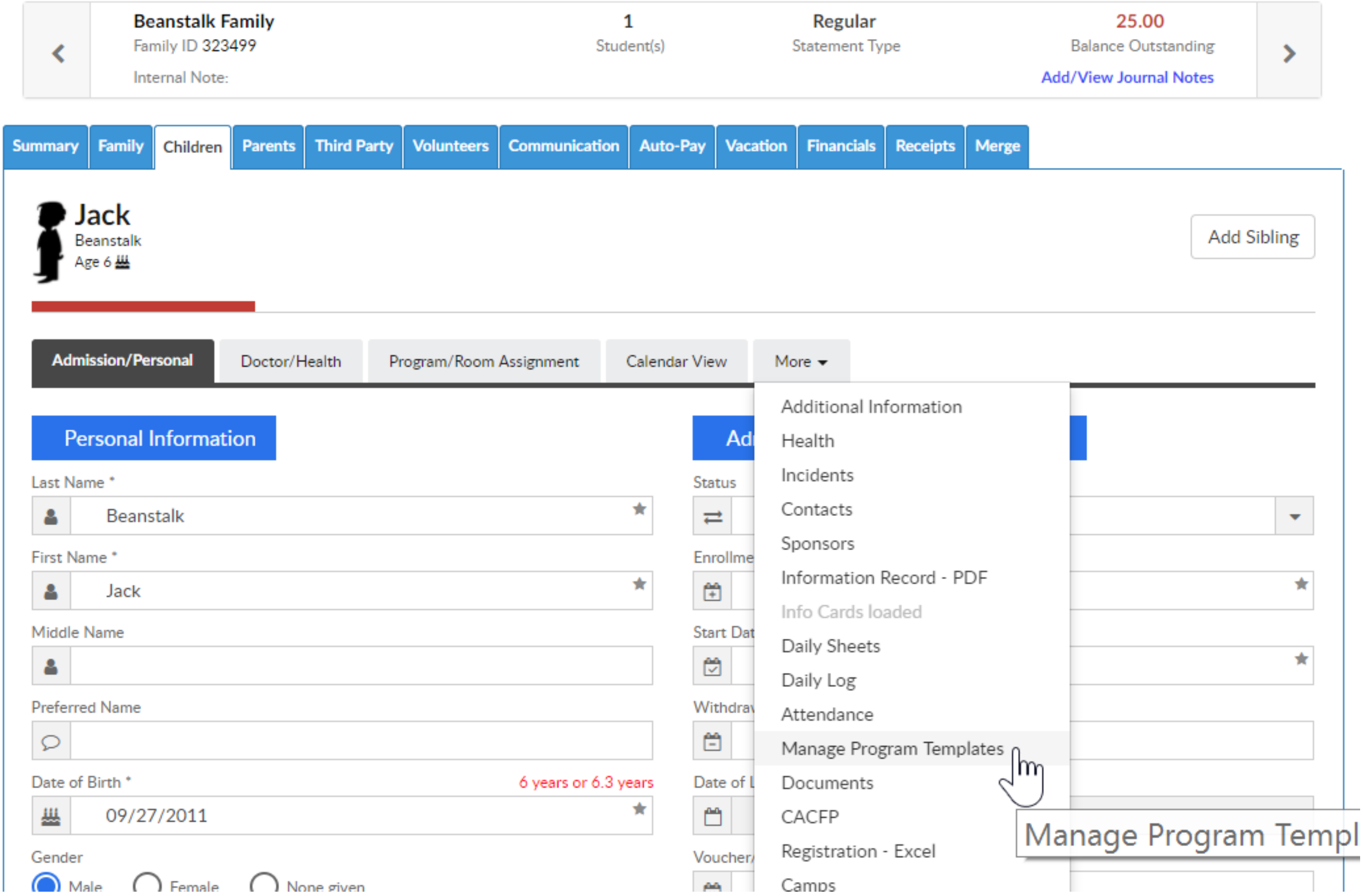
Once this opens an excel record of the attendance detail will display.

Family Record, Child Tab- More, Manage Program Templates

Last Modified on 04/03/2018 8:49 am EDT

Program Templates allow a user to setup a custom attedance schedule for a specific child- attending every other week or allow a center to associate a specific set of weeks to one sponsor or the other.

From the family record, select the Children tab. Then select the More drop down box and select Manage Program Templates.



Beanstalk Family
Family ID 323499
Internal Note:

1 Student(s)

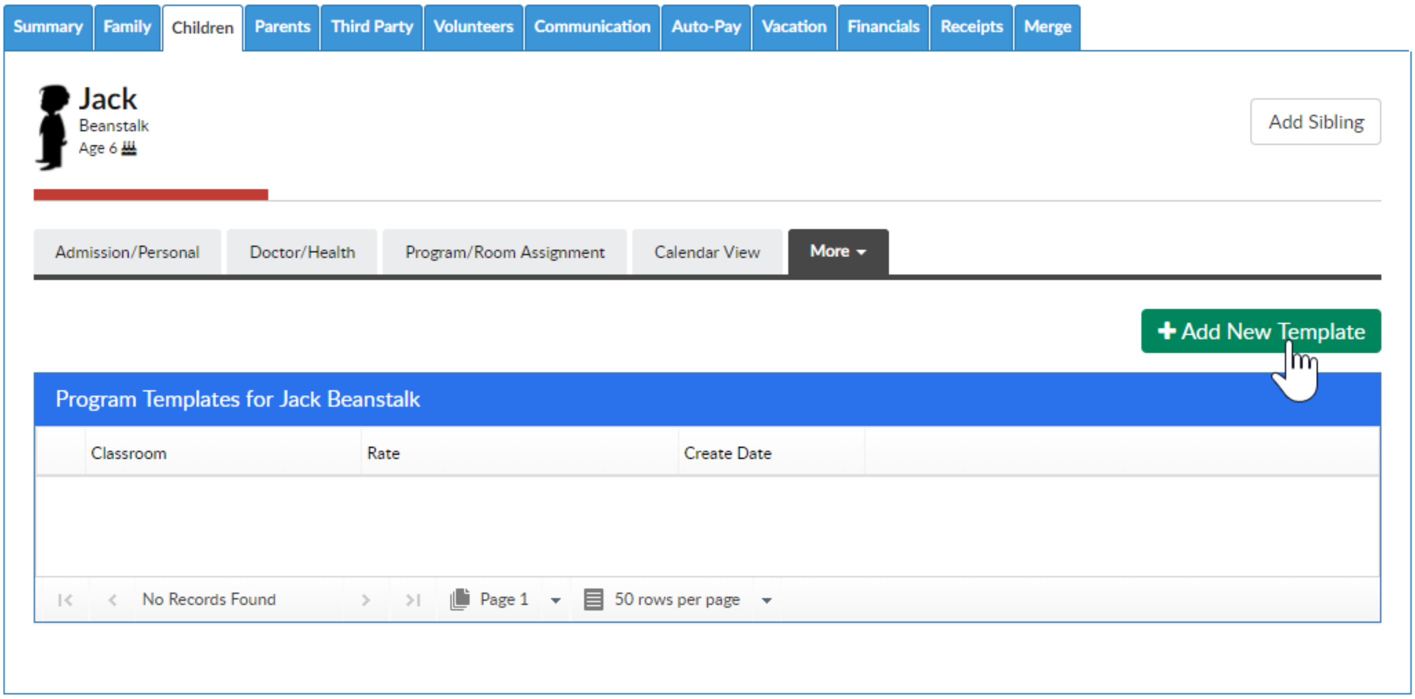
Regular Statement Type

25.00 Balance Outstanding

Jack
Beanstalk
Age 6

Last Name * Beanstalk
First Name * Jack
Middle Name
Preferred Name
Date of Birth * 09/27/2011 6 years or 6.3 years
Gender ● Male ○ Female ○ None given

To add a new template select the Add New Template option-



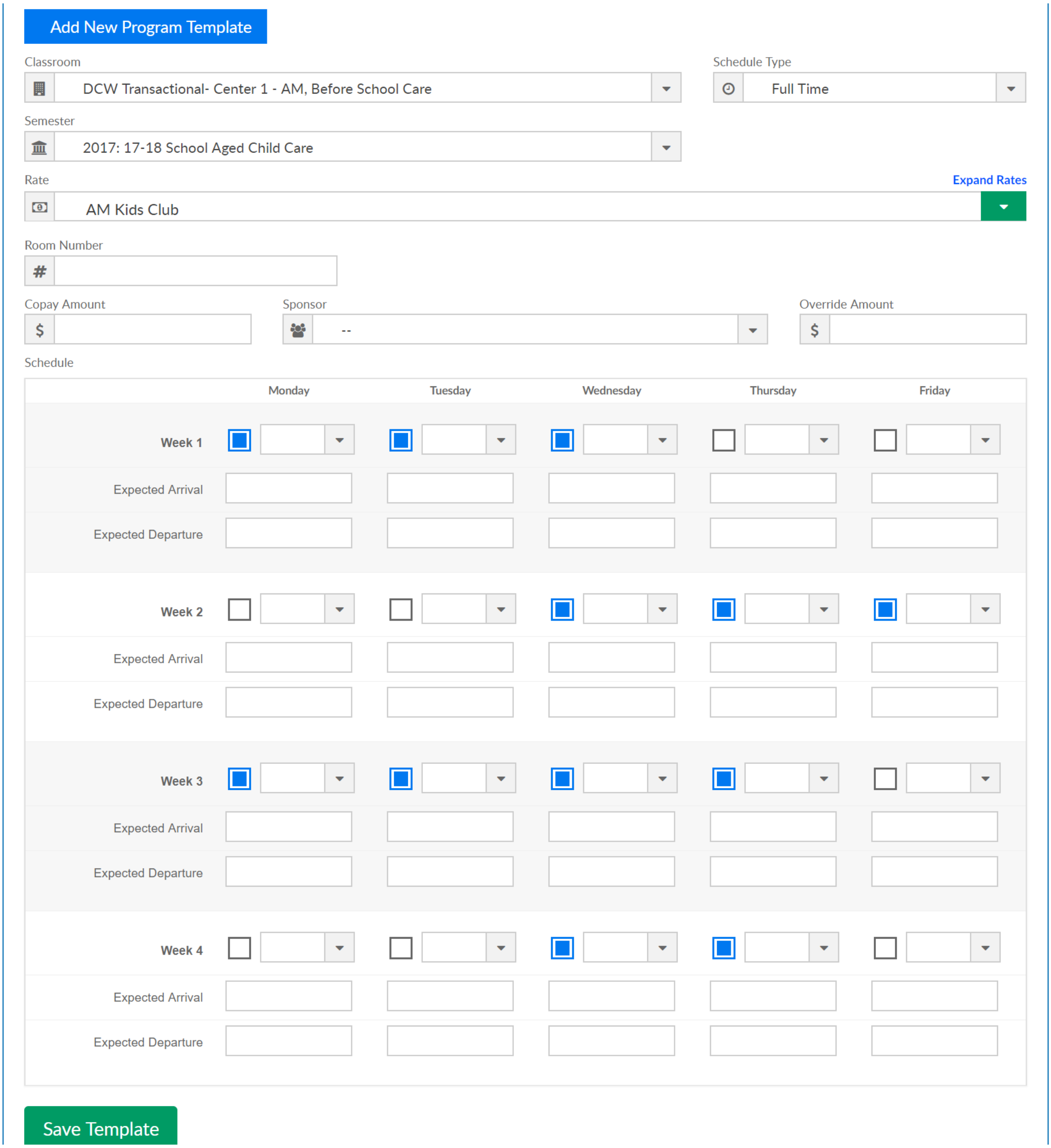
Program Templates for Jack Beanstalk

Classroom	Rate	Create Date

No Records Found

Select the Classroom, semester, schedule type and rate.

Room number, copay amount, sponsor and override amount are optional if a family is split due to divorce or sponsored. Select the specific days, expected arrival and departure date- then press Save Template.



Add New Program Template

Classroom: DCW Transactional- Center 1 - AM, Before School Care

Schedule Type: Full Time

Semester: 2017: 17-18 School Aged Child Care

Rate: AM Kids Club

Expand Rates

Room Number: #

Copay Amount: $

Sponsor: --

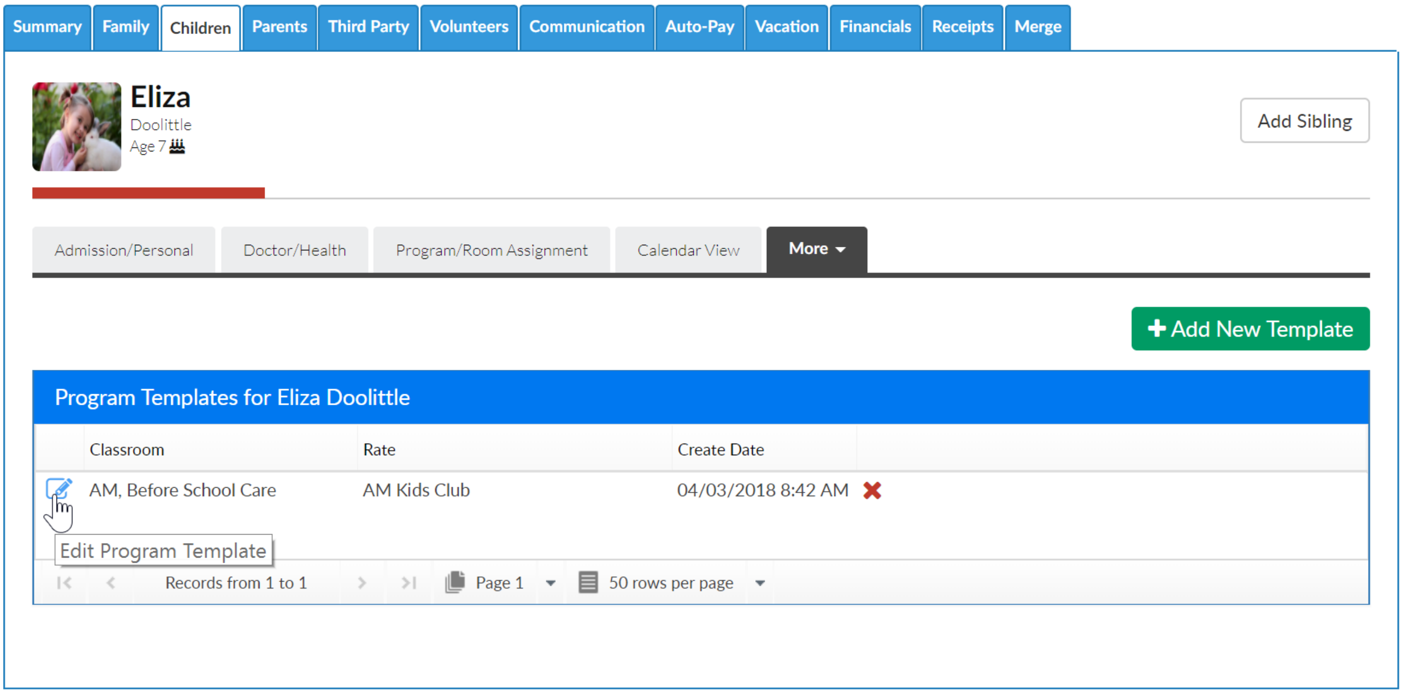
Override Amount: $

Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	☑	☑	☑	☐	☐
Expected Arrival					
Expected Departure					
Week 2	☐	☐	☑	☑	☑
Expected Arrival					
Expected Departure					
Week 3	☑	☑	☑	☑	☐
Expected Arrival					
Expected Departure					
Week 4	☐	☐	☑	☑	☐
Expected Arrival					
Expected Departure					

Save Template

To apply this template to a specific time open the template, then add from and to dates in the Create/Update Room Assignments Based on This Template section.



Eliza
Doolittle
Age 7

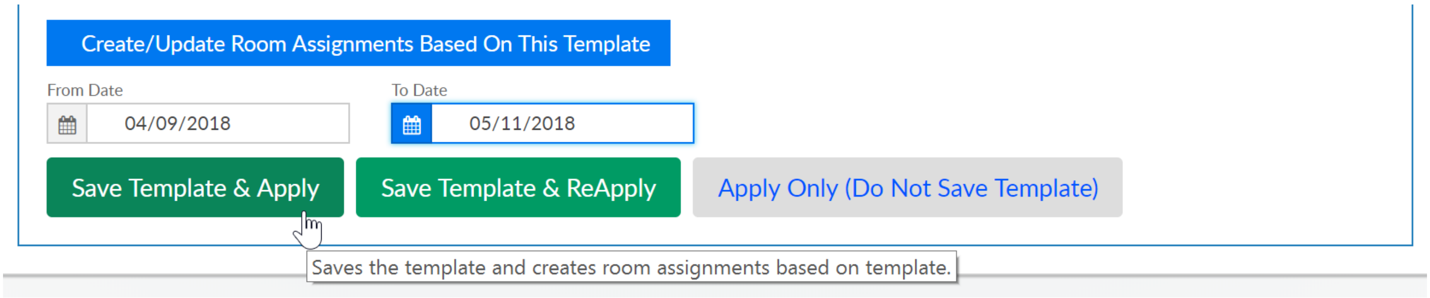
Program Templates for Eliza Doolittle

Classroom	Rate	Create Date
AM, Before School Care	AM Kids Club	04/03/2018 8:42 AM

Edit Program Template

Records from 1 to 1 Page 1 50 rows per page

Press Save Template & Apply to set the schedule for a child's program/room assignment-



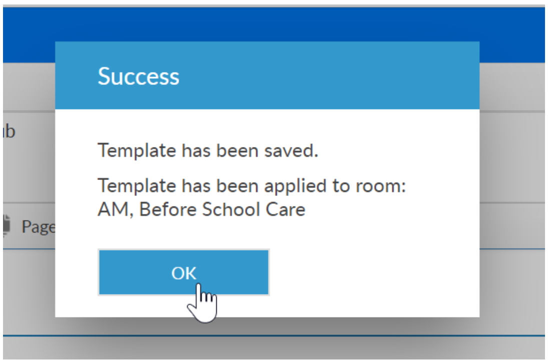
Create/Update Room Assignments Based On This Template

From Date: 04/09/2018

To Date: 05/11/2018

Saves the template and creates room assignments based on template.

A confirmation box will display when application has been completed.

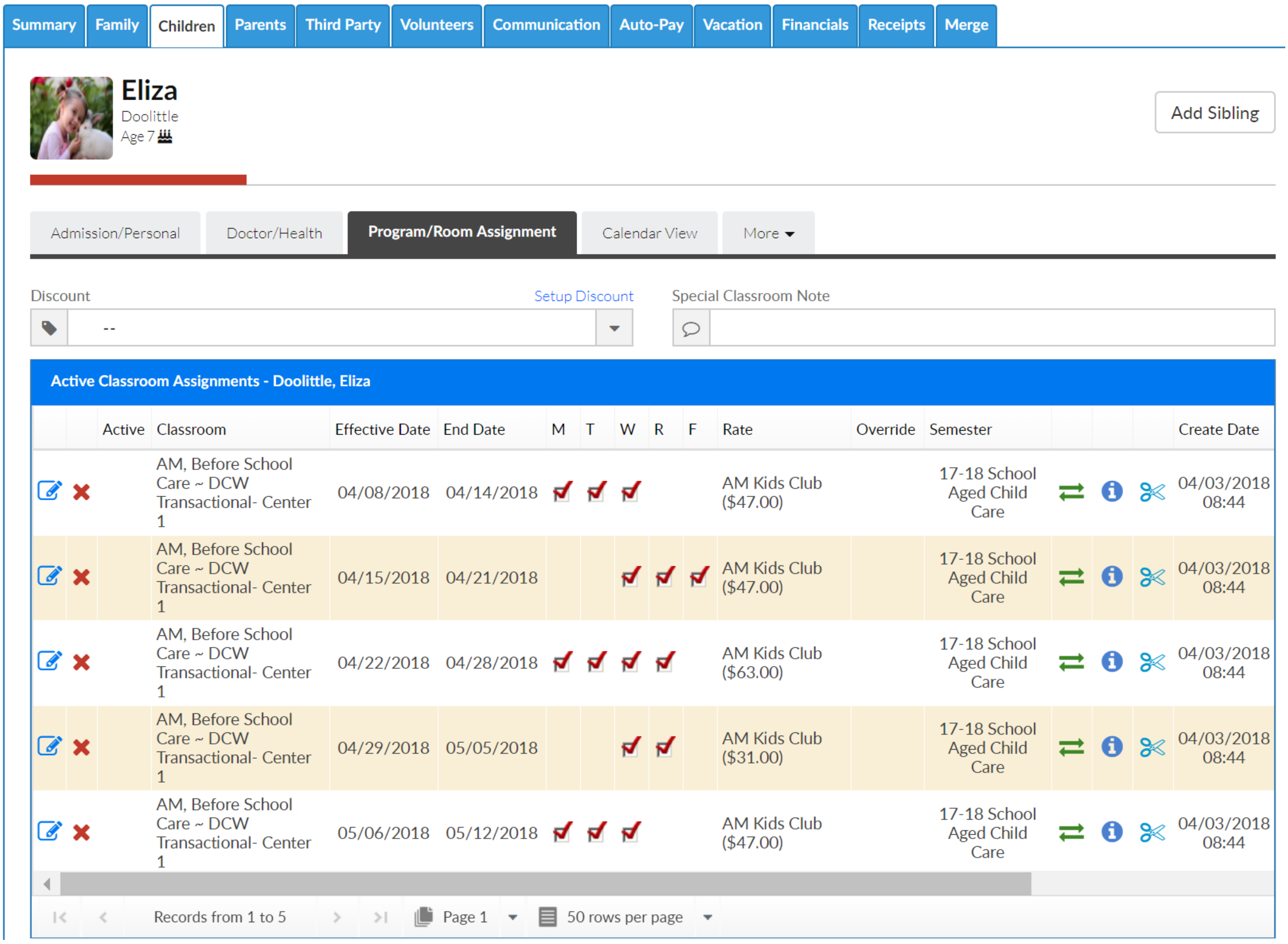


Success

Template has been saved.

Template has been applied to room: AM, Before School Care

The child's program/room assignment page will display the updated schedule-



Eliza
Doolittle
Age 7

Discount: --

Special Classroom Note:

Active Classroom Assignments - Doolittle, Eliza

Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester	Create Date
	AM, Before School Care ~ DCW Transactional- Center 1	04/08/2018	04/14/2018	✓	✓	✓			AM Kids Club ($47.00)		17-18 School Aged Child Care	04/03/2018 08:44
	AM, Before School Care ~ DCW Transactional- Center 1	04/15/2018	04/21/2018			✓	✓	✓	AM Kids Club ($47.00)		17-18 School Aged Child Care	04/03/2018 08:44
	AM, Before School Care ~ DCW Transactional- Center 1	04/22/2018	04/28/2018	✓	✓	✓	✓		AM Kids Club ($63.00)		17-18 School Aged Child Care	04/03/2018 08:44
	AM, Before School Care ~ DCW Transactional- Center 1	04/29/2018	05/05/2018			✓	✓		AM Kids Club ($31.00)		17-18 School Aged Child Care	04/03/2018 08:44
	AM, Before School Care ~ DCW Transactional- Center 1	05/06/2018	05/12/2018	✓	✓	✓			AM Kids Club ($47.00)		17-18 School Aged Child Care	04/03/2018 08:44

Records from 1 to 5 Page 1 50 rows per page

If changes must be made to the child's program/room assignment schedule on an on-going basis, go back to the manage program template screen.

Open the schedule template.

Make changes to the days or times scheduled.

Scroll to the bottom of the page and enter the start and end date of the schedule. Then press Save and Re-Apply. The changes that have been made will update the child's program/room assignments.

Family Record, Child Tab- More, Documents/Checklist

Last Modified on 01/04/2019 12:48 pm EST

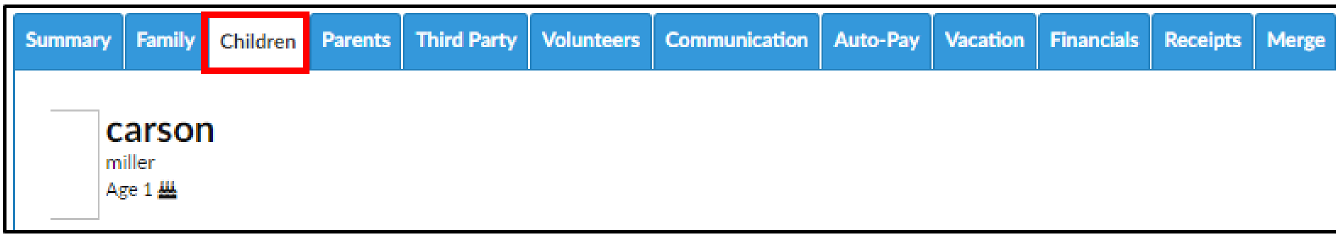
The Documents/Checklist screen from the Children tab allows users to upload student-specific documents into the system. Administrators can create a list of required documents for students meeting certain criteria, such as the center they attend, age or grade of the student, etc.

For document setup instructions, click here

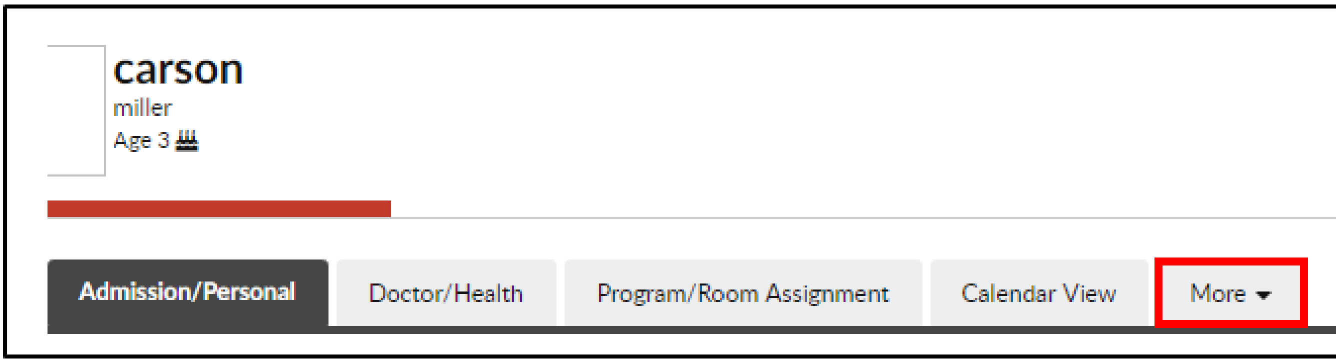
Viewing Required/Uploaded Documents Per Student

To view documents previously uploaded or uploads required for a student, follow the steps below:

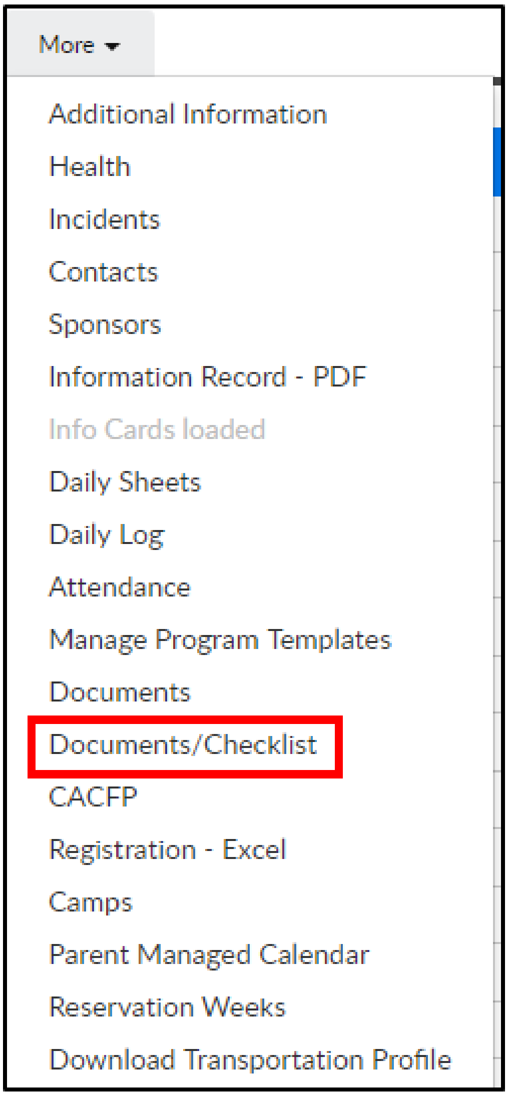
1. Navigate to a family's record and click the Children tab



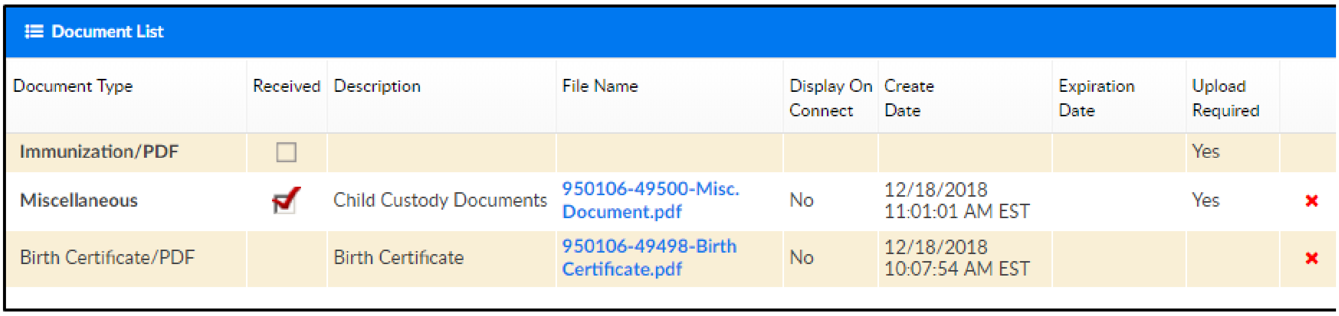
2. Click the More tab



3. Select Documents/Checklist from the drop-down menu



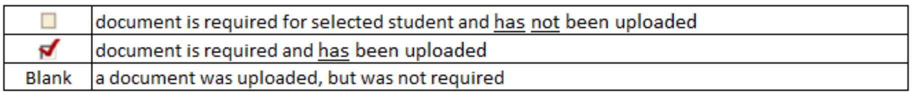
4. The Document List section will show required and previously uploaded documents for the selected student



Document List

Document Type	Received	Description	File Name	Display On Connect	Create Date	Expiration Date	Upload Required	
Immunization/PDF	☐						Yes	
Miscellaneous	✓	Child Custody Documents	950106-49500-Misc. Document.pdf	No	12/18/2018 11:01:01 AM EST		Yes	×
Birth Certificate/PDF		Birth Certificate	950106-49498-Birth Certificate.pdf	No	12/18/2018 10:07:54 AM EST			×

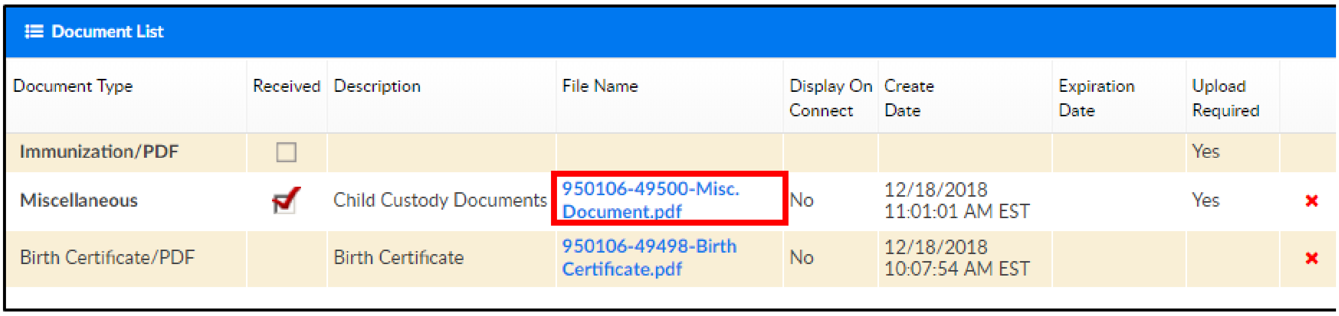
- Document Type – the type of document selected from a drop-down list
- Received



☐	document is required for selected student and has not been uploaded
✓	document is required and has been uploaded
Blank	a document was uploaded, but was not required

5. Description – the description field is a free text field to enter the name or a description of the document
6. File Name – the file name is the name of the document uploaded. The system will automatically place the student's ID and a document ID in front of the document

name. In the below example, the student's ID is 950106, the document ID is 49500, and the file name uploaded was "Misc. Document"



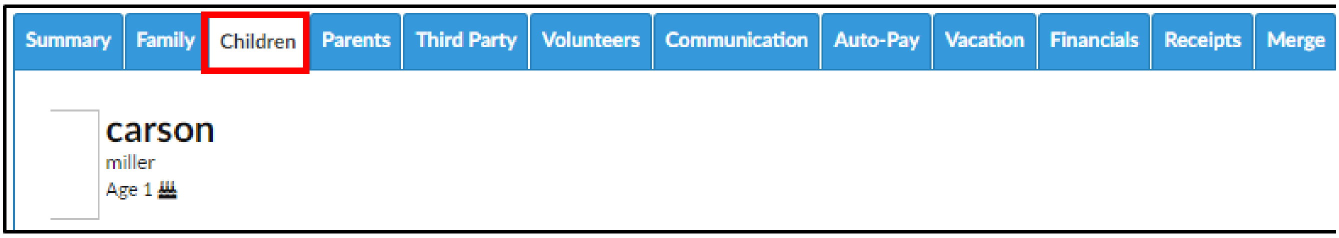
Document Type	Received	Description	File Name	Display On Connect	Create Date	Expiration Date	Upload Required	
Immunization/PDF	☐						Yes	
Miscellaneous	✓	Child Custody Documents	950106-49500-Misc. Document.pdf	No	12/18/2018 11:01:01 AM EST		Yes	✖
Birth Certificate/PDF		Birth Certificate	950106-49498-Birth Certificate.pdf	No	12/18/2018 10:07:54 AM EST			✖

7. Display on Connect
    - Yes - the document should be available for parents to view via the Connect (Parent) Portal
    - No – the document should not be viewable from Connect
8. Create Date – the date and time the document was uploaded
9. Expiration Date – if the document expires, the expiration date will be in this field
10. Upload Required
    - Yes - a document is required to be uploaded
    - No – no upload is required

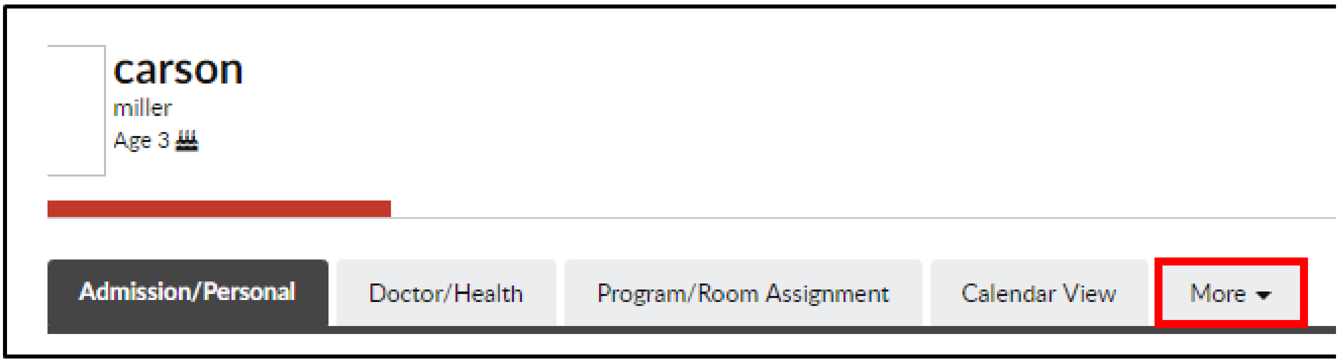
Uploading a Document to a Student's Record

To upload a document to a student's record, follow the steps below:

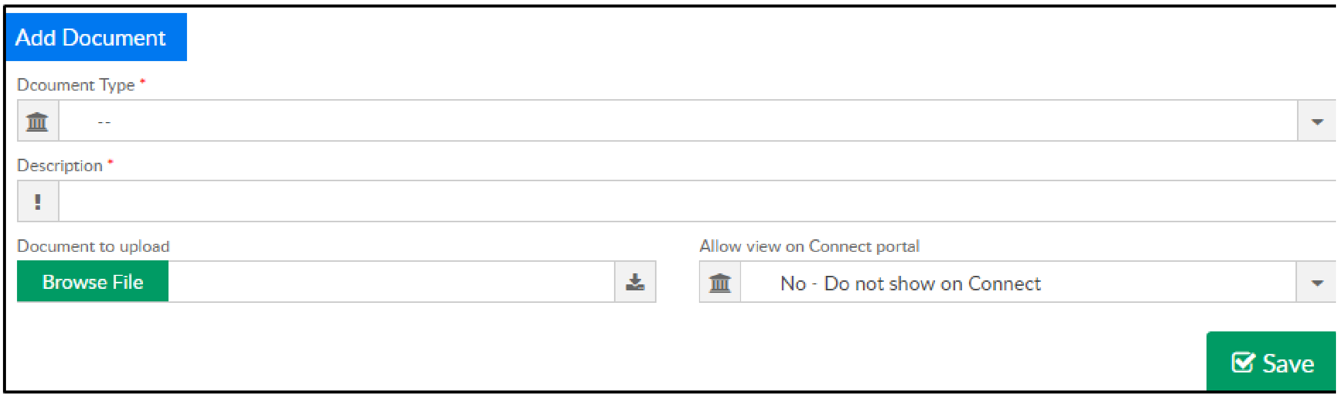
1. To upload a new document, navigate to the family's record and select the Children Tab



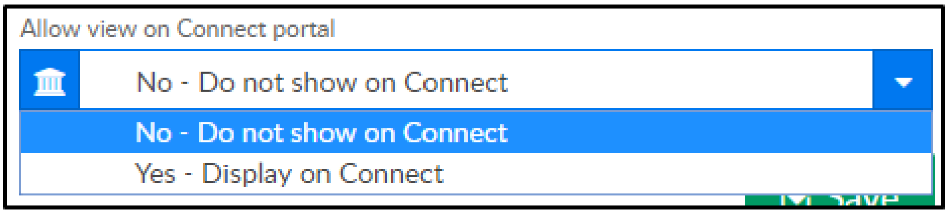
2. Click the More tab and select Documents/Checklist from the drop-down menu


carson
miller
Age 3

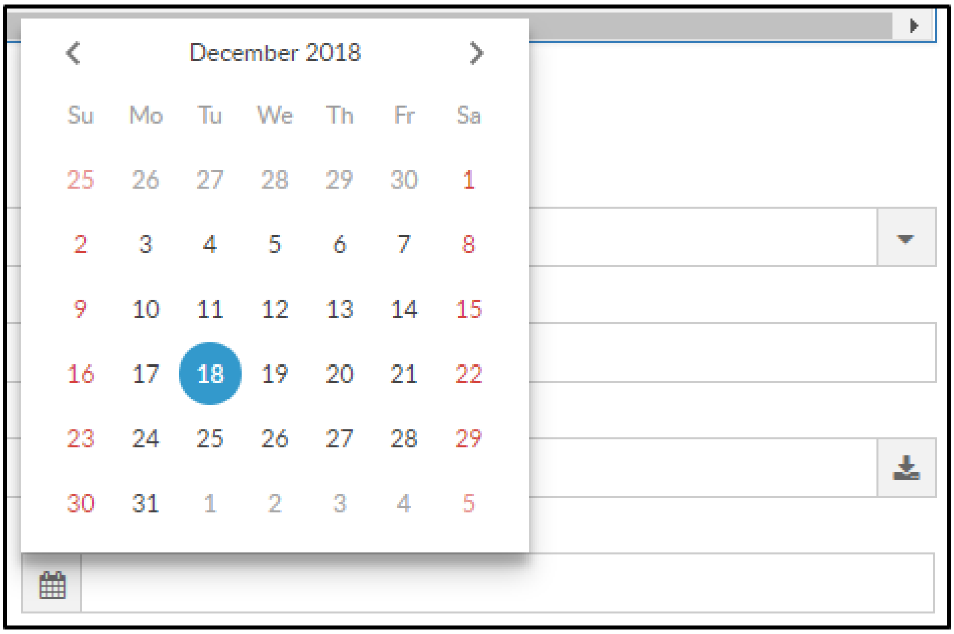
3. Complete the Add Document section


Add Document
Dcoument Type *: --
Description *:
Document to upload:
Allow view on Connect portal: No - Do not show on Connect

4. Document Type – choose from the drop-down menu
5. Description – enter a description or name of the document
6. Document to Upload – click into the Browse File field to search and select the document to upload from the computer
7. Allow View on Connect Portal
    - No – Do no show on Connect – parents are unable to see the uploaded document on the Parent Portal
    - Yes – Display on Connect – this option will allow parents to see the uploaded document on the Parent Portal


Allow view on Connect portal: No - Do not show on Connect

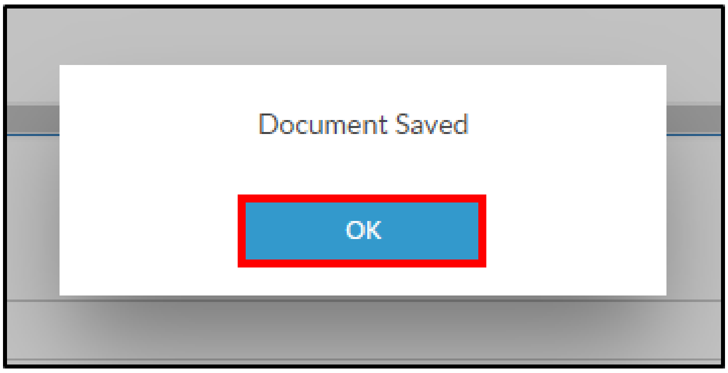
8. Expiration Date – if the document expires or needs to be updated annually, semi-annually, etc., select the date from the calendar



December 2018

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

9. Click Save
10. A confirmation popup will appear, click OK



Document Saved

Family Record, Child Tab - More, CACFP

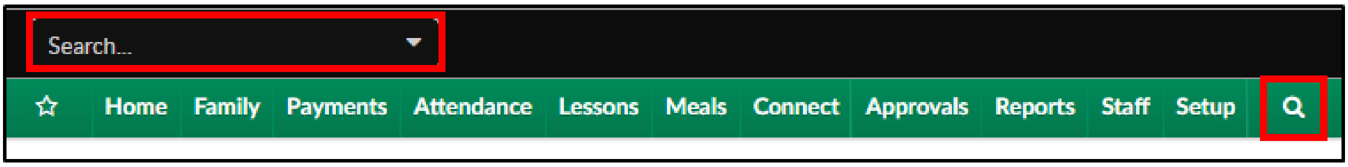
Last Modified on 01/04/2019 10:10 am EST

Once CACFP guidelines have been setup , the status (free, reduced or paid) can be added to each student within a family. Alternatively, the system can calculate the student's status.

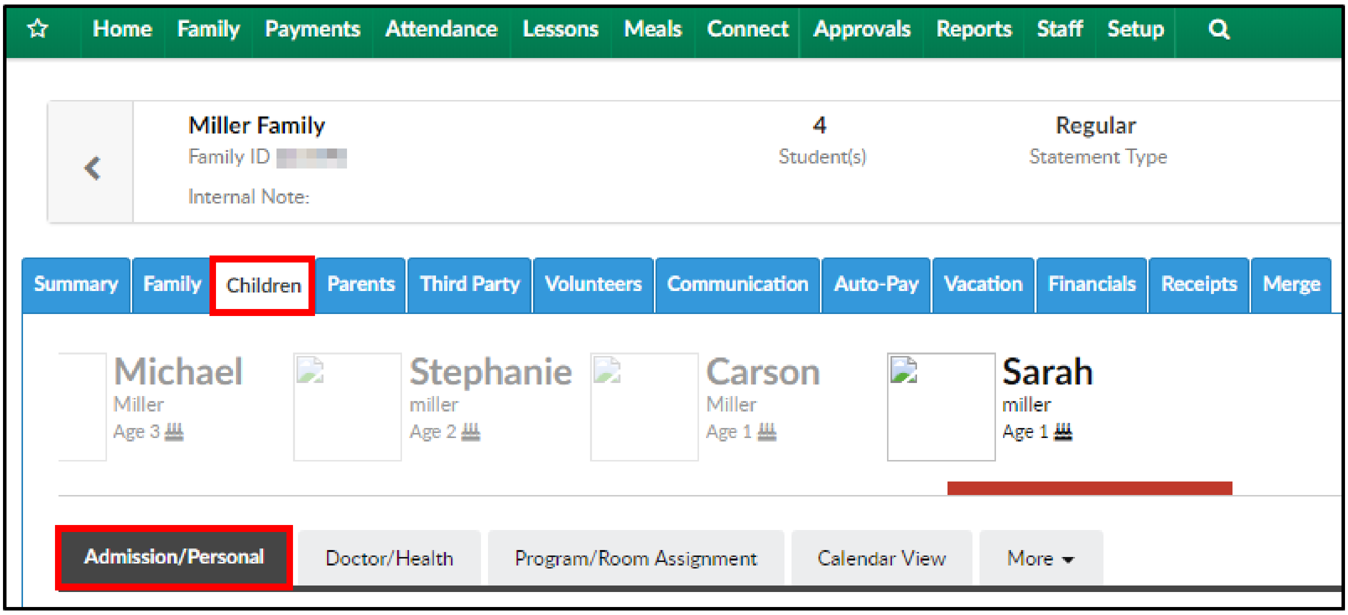
Adding a Student's Status - Manually

To manually add a student's status, follow the steps below:

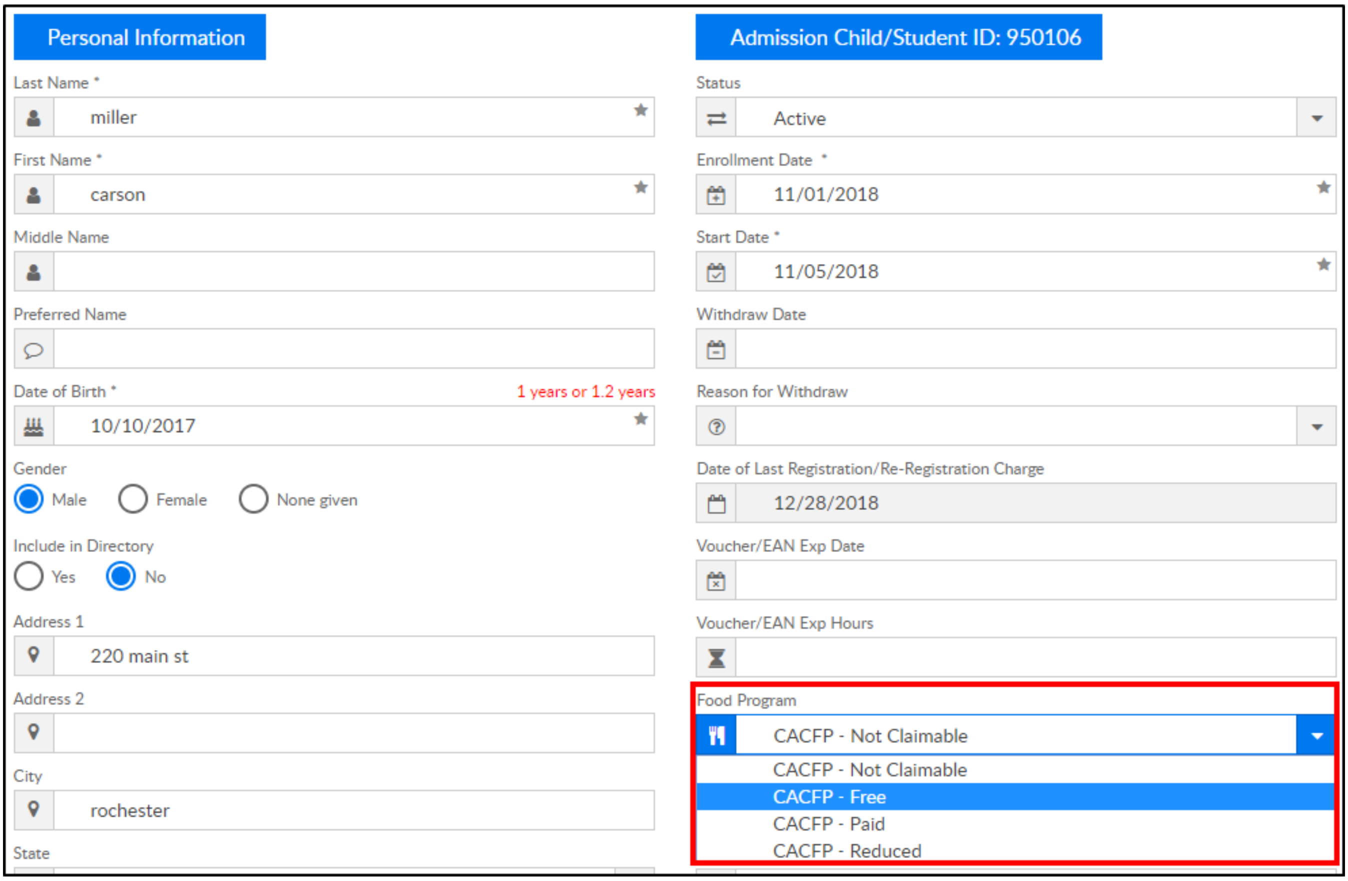
1. Navigate to a family's record by searching the last name in the search field or click the magnifying glass



2. Ensure the Children's tab is displaying, then select the Admission/Personal tab



3. Locate the Food Program drop-down and choose the correct option for the student



Personal Information

Last Name * miller

First Name * carson

Middle Name

Preferred Name

Date of Birth * 10/10/2017 1 years or 1.2 years

Gender ● Male ○ Female ○ None given

Include in Directory ○ Yes ● No

Address 1 220 main st

Address 2

City rochester

State

Admission Child/Student ID: 950106

Status Active

Enrollment Date * 11/01/2018

Start Date * 11/05/2018

Withdraw Date

Reason for Withdraw

Date of Last Registration/Re-Registration Charge 12/28/2018

Voucher/EAN Exp Date

Voucher/EAN Exp Hours

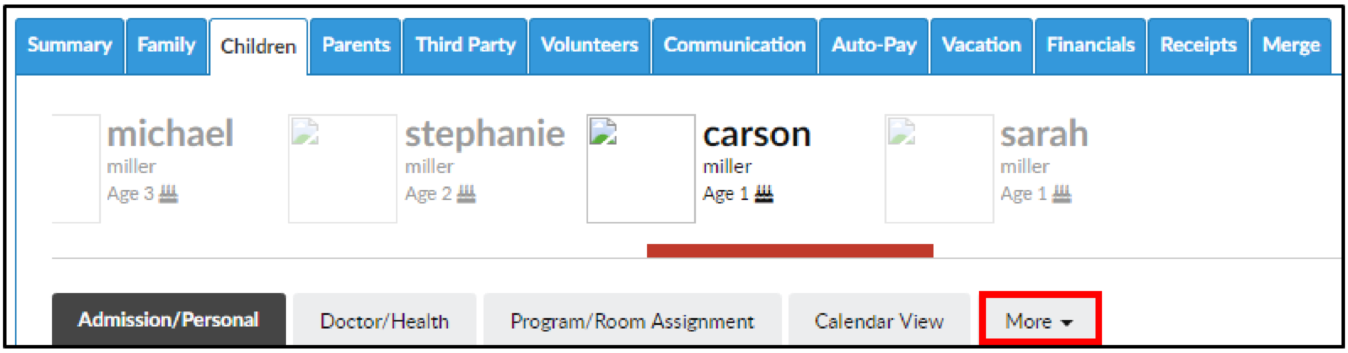
Food Program CACFP - Not Claimable

4. Click Save. Each time a meal is served, the student will be counted towards the selected status' total

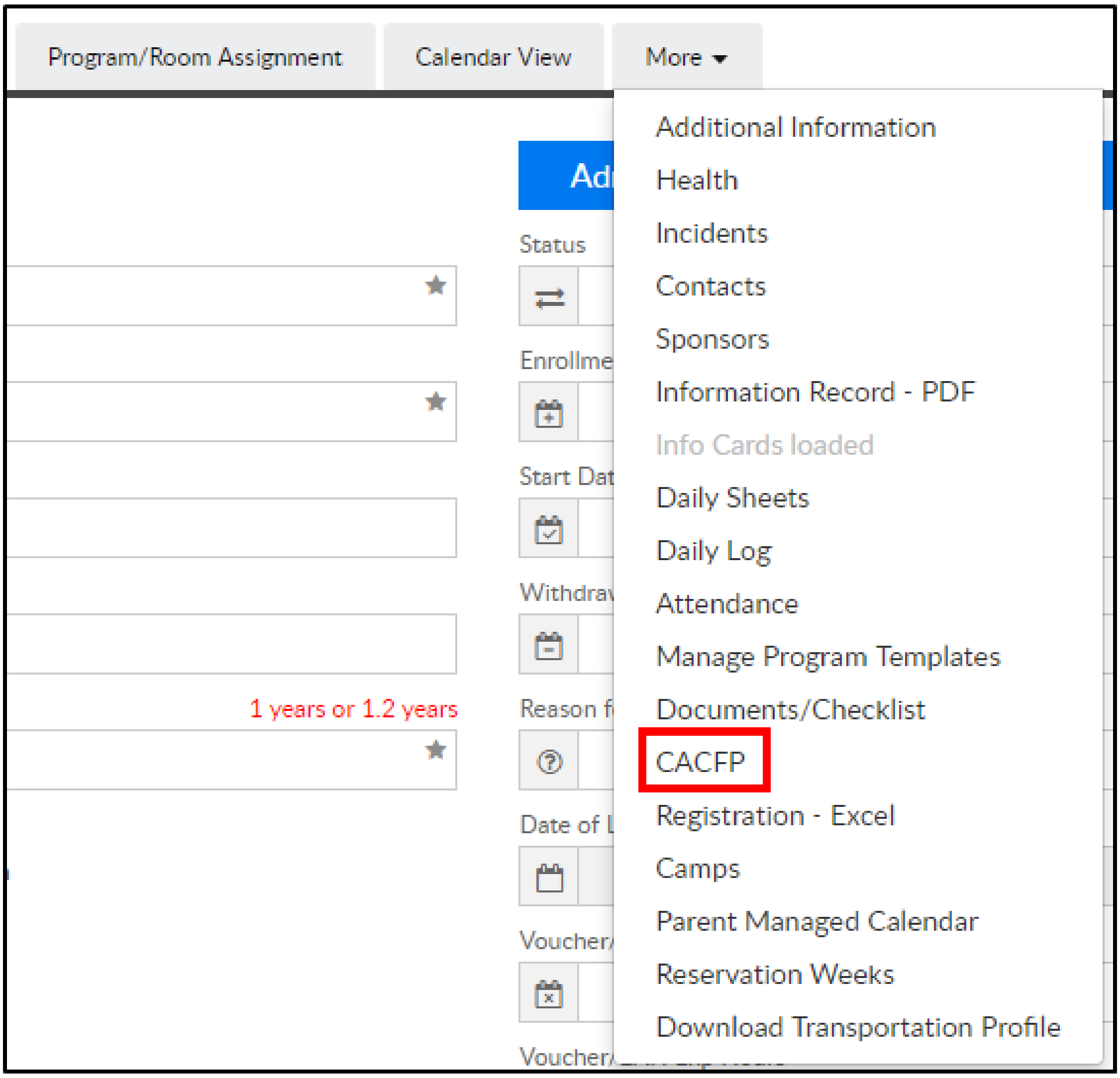
Adding a Student's Status - Calculation

To have the system calculate the student's status by entering the family income, follow the steps below:

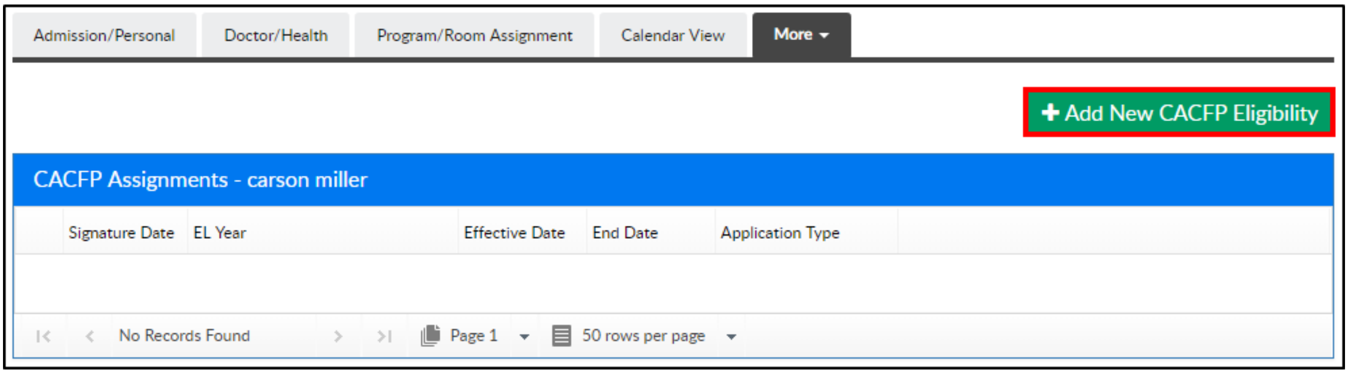
1. Locate the family's record
2. On the Children tab, click More



3. Select CACFP from the More menu



4. Click Add New CACFP Eligibility



5. Complete the Assign CACFP Eligibility section

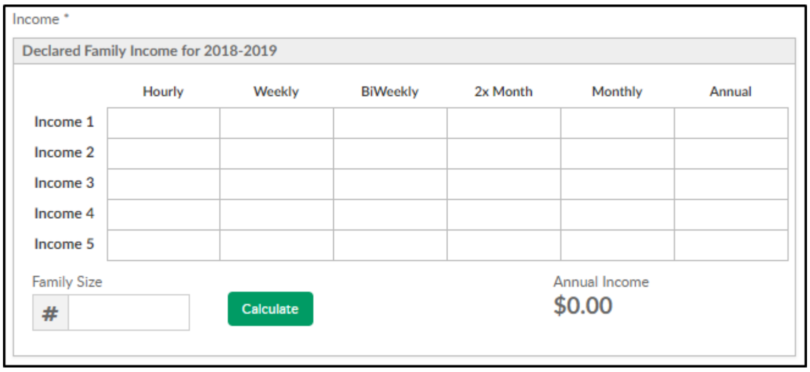
Center *
DCW Transactional- CENTER 1

Enrollment Date *
11/05/2018

CACFP Enrollment Application *
Yes

- Center - select the center the student is attending from the drop-down
- Enrollment Date - enter the date the student was enrolled into the center

    - CACFP Enrollment Application
        - Yes - the student has submitted an application, more options will appear
        - No - the student has not submitted an application and the student will not appear on the meal count sheets
6. Eligibility Year - choose from the drop-down
7. CACFP Signature Date - add the signature date
8. Funding Type - choose the funding type, if available
9. Application Signed By Parent
    - Yes - the parent has signed the application
    - No - the parent has not signed the application
10. Race - choose the student's race from the drop-down
11. Ethnicity - select the ethnicity
12. Application Type - choose the application type. If the system should calculate the student's status, choose one of the calculate options
    - If using a non-calculate option, click Save or Save All Children in Family
    - If using a calculate option, continue the steps below
13. Document Available
    - Yes - a document is available, continue below
    - No - no agency document is available, this application is not CACFP eligible
14. Enter the family's income in the Income chart. The total income will be compared to the income eligibility table previously setup



Income *

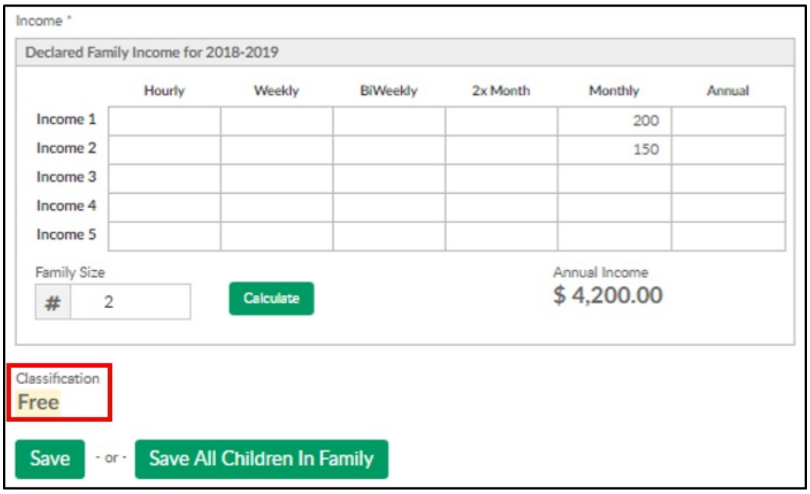
Declared Family Income for 2018-2019

	Hourly	Weekly	BiWeekly	2x Month	Monthly	Annual
Income 1						
Income 2						
Income 3						
Income 4						
Income 5						

Family Size
#

Annual Income
$0.00

15. Enter the Family Size
16. Click Calculate
17. The Classification will display


Income *

Declared Family Income for 2018-2019

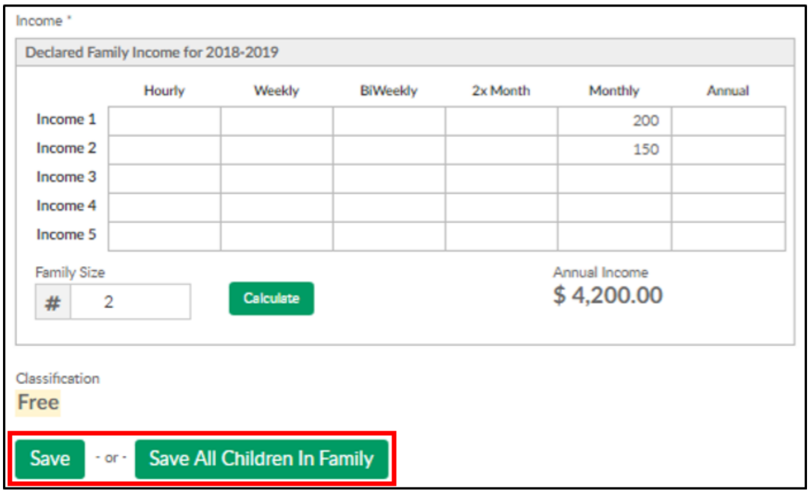
	Hourly	Weekly	BiWeekly	2x Month	Monthly	Annual
Income 1					200	
Income 2					150	
Income 3						
Income 4						
Income 5						

Family Size: # 2

Annual Income: $ 4,200.00

Classification: Free

18. Click Save to save to only the selected student or click Save All Children In Family to save the classification to all students


Income *

Declared Family Income for 2018-2019

	Hourly	Weekly	BiWeekly	2x Month	Monthly	Annual
Income 1					200	
Income 2					150	
Income 3						
Income 4						
Income 5						

Family Size: # 2

Annual Income: $ 4,200.00

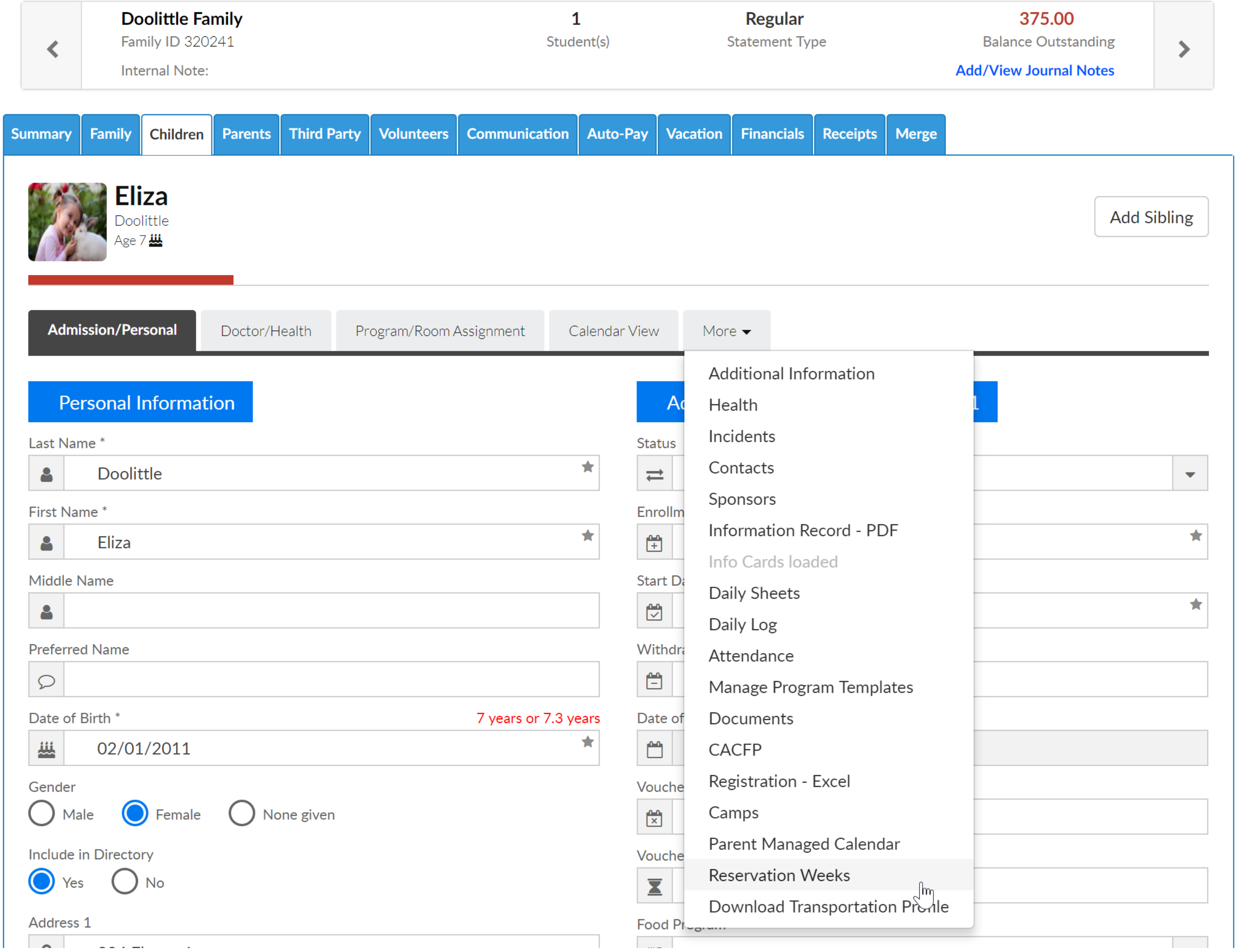
Classification: Free

Family Record, Child Tab- More, Registration-Excel

Last Modified on 04/03/2018 8:33 am EDT

The Registration- Excel file displays a child's registration detail in excel format.

From the child tab of the family record, select the more menu- then select Registration- Excel.

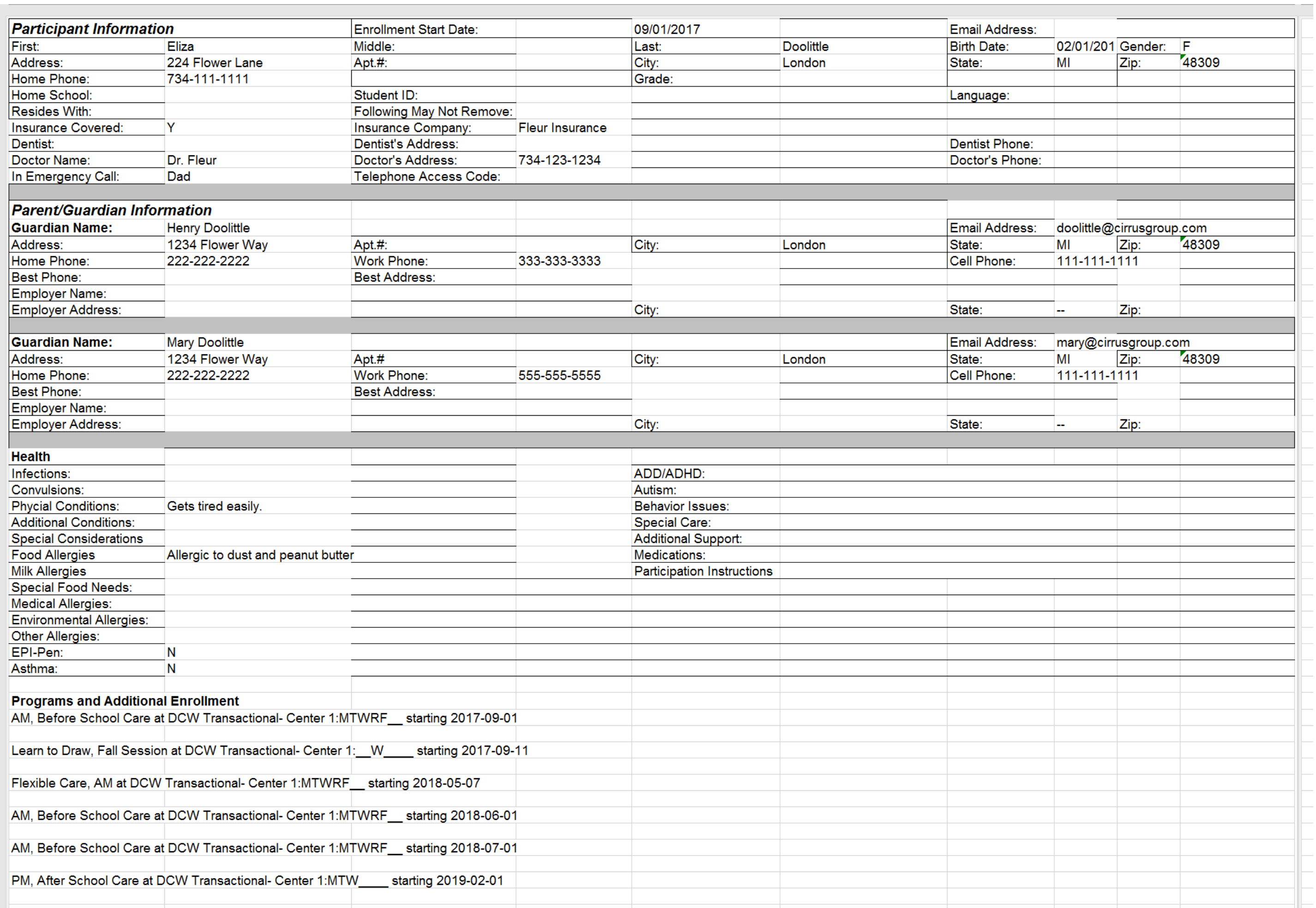


Doolittle Family
Family ID 320241
Internal Note:
1 Student(s)
Regular Statement Type
375.00 Balance Outstanding

Eliza
Doolittle
Age 7

Last Name * Doolittle
First Name * Eliza
Middle Name
Preferred Name
Date of Birth * 02/01/2011 — 7 years or 7.3 years
Gender: ○ Male ● Female ○ None given
Include in Directory: ● Yes ○ No
Address 1

The file will download and open in Excel-



Participant Information		Enrollment Start Date:		09/01/2017		Email Address:			
First:	Eliza	Middle:		Last:	Doolittle	Birth Date:	02/01/201	Gender:	F
Address:	224 Flower Lane	Apt.#:		City:	London	State:	MI	Zip:	48309
Home Phone:	734-111-1111			Grade:					
Home School:		Student ID:				Language:			
Resides With:		Following May Not Remove:							
Insurance Covered:	Y	Insurance Company:	Fleur Insurance						
Dentist:		Dentist's Address:				Dentist Phone:			
Doctor Name:	Dr. Fleur	Doctor's Address:	734-123-1234			Doctor's Phone:			
In Emergency Call:	Dad	Telephone Access Code:							
Parent/Guardian Information									
Guardian Name:	Henry Doolittle					Email Address:	doolittle@cirrusgroup.com		
Address:	1234 Flower Way	Apt.#:		City:	London	State:	MI	Zip:	48309
Home Phone:	222-222-2222	Work Phone:	333-333-3333			Cell Phone:	111-111-1111		
Best Phone:		Best Address:							
Employer Name:									
Employer Address:				City:		State:	--	Zip:	
Guardian Name:	Mary Doolittle					Email Address:	mary@cirrusgroup.com		
Address:	1234 Flower Way	Apt.#		City:	London	State:	MI	Zip:	48309
Home Phone:	222-222-2222	Work Phone:	555-555-5555			Cell Phone:	111-111-1111		
Best Phone:		Best Address:							
Employer Name:									
Employer Address:				City:		State:	--	Zip:	
Health									
Infections:				ADD/ADHD:					
Convulsions:				Autism:					
Phycial Conditions:	Gets tired easily.			Behavior Issues:					
Additional Conditions:				Special Care:					
Special Considerations				Additional Support:					
Food Allergies	Allergic to dust and peanut butter			Medications:					
Milk Allergies				Participation Instructions					
Special Food Needs:									
Medical Allergies:									
Environmental Allergies:									
Other Allergies:									
EPI-Pen:	N								
Asthma:	N								

Programs and Additional Enrollment

AM, Before School Care at DCW Transactional- Center 1:MTWRF__ starting 2017-09-01

Learn to Draw, Fall Session at DCW Transactional- Center 1:__W____ starting 2017-09-11

Flexible Care, AM at DCW Transactional- Center 1:MTWRF__ starting 2018-05-07

AM, Before School Care at DCW Transactional- Center 1:MTWRF__ starting 2018-06-01

AM, Before School Care at DCW Transactional- Center 1:MTWRF__ starting 2018-07-01

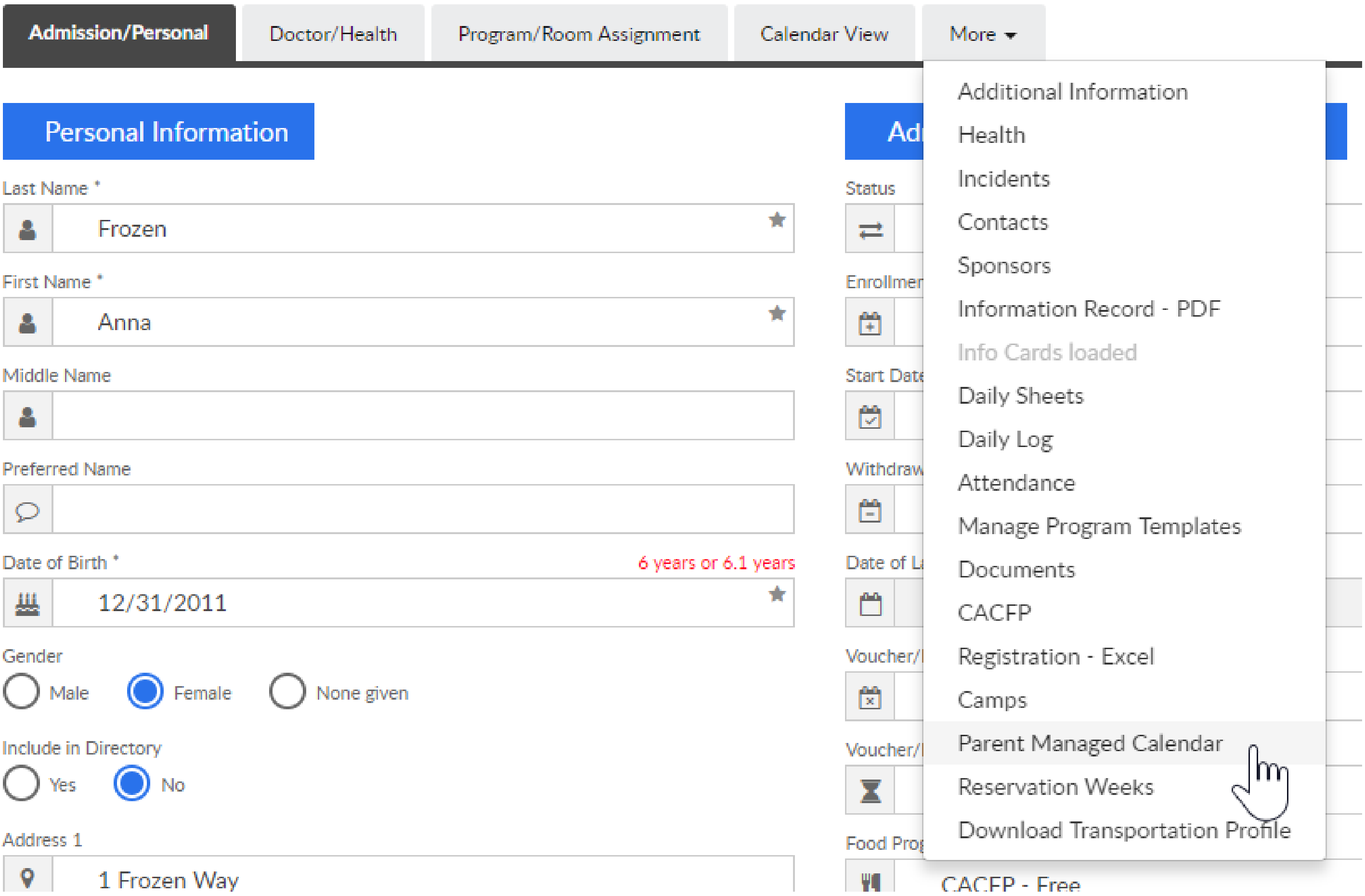
PM, After School Care at DCW Transactional- Center 1:MTW____ starting 2019-02-01

Family Record, Child Tab- More, Parent Managed Calendar

Last Modified on 01/04/2018 8:34 am EST

The parent managed calendar option on the more drop down menu allows admin/staff users to add parent manged calendar days for children/families from the admin side.

From the family record, select the more tab- then select the Parent Managed Calendar option.



Personal Information

Last Name * Frozen

First Name * Anna

Middle Name

Preferred Name

Date of Birth * 12/31/2011 6 years or 6.1 years

Gender ○ Male ● Female ○ None given

Include in Directory ○ Yes ● No

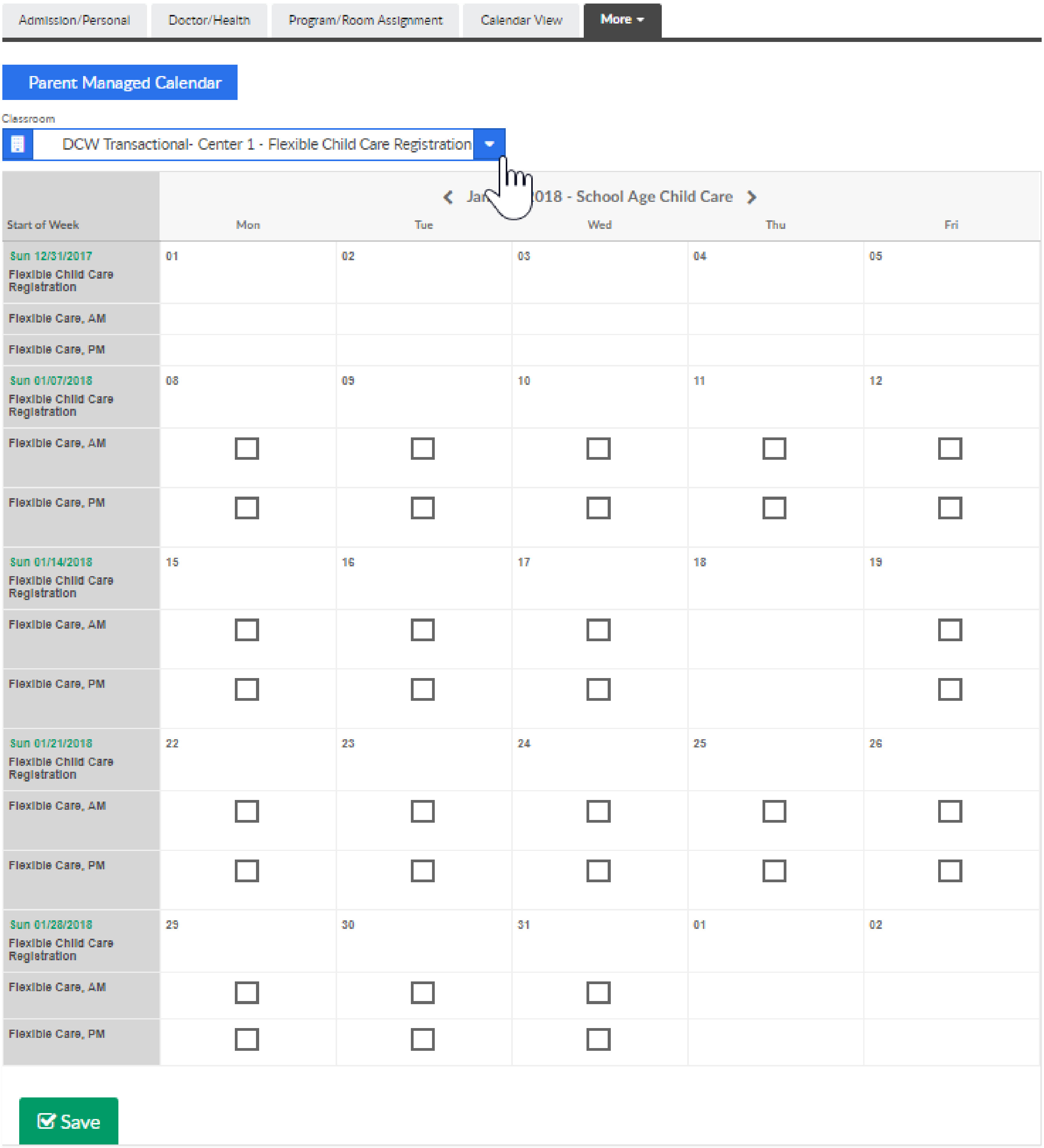
Address 1 1 Frozen Way

CACFP - Free

On the Parent Managed page, the calendar will display. In order for the calendar to display the child must be added to the parent managed registration room.

- Select the Classroom drop down menu if the child is involved in multiple registration room
- The calendar options will display available days for selection
- As days are selected fees will automatically be added to the family's financial

ledger for the day once Save is selected

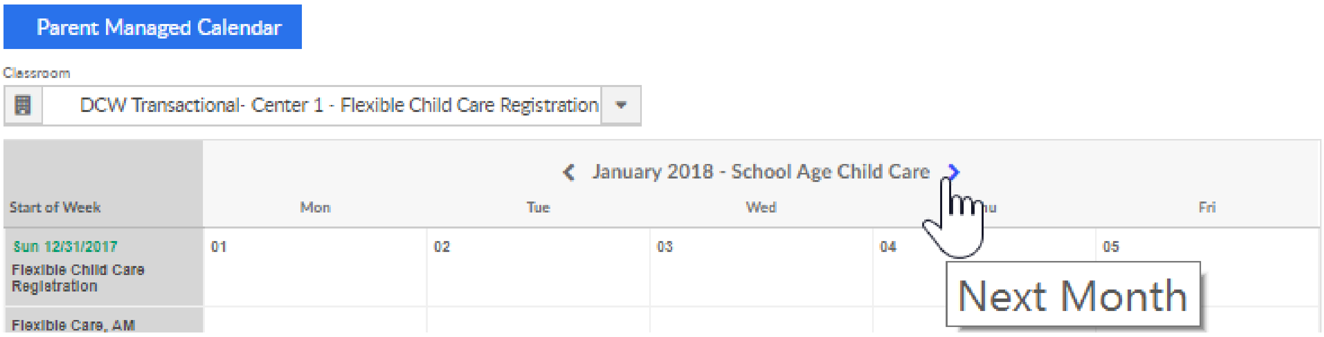


Classroom

DCW Transactional- Center 1 - Flexible Child Care Registration

Start of Week	Mon	Tue	Wed	Thu	Fri
Sun 12/31/2017 Flexible Child Care Registration	01	02	03	04	05
Flexible Care, AM					
Flexible Care, PM					
Sun 01/07/2018 Flexible Child Care Registration	08	09	10	11	12
Flexible Care, AM	☐	☐	☐	☐	☐
Flexible Care, PM	☐	☐	☐	☐	☐
Sun 01/14/2018 Flexible Child Care Registration	15	16	17	18	19
Flexible Care, AM	☐	☐	☐		☐
Flexible Care, PM	☐	☐	☐		☐
Sun 01/21/2018 Flexible Child Care Registration	22	23	24	25	26
Flexible Care, AM	☐	☐	☐	☐	☐
Flexible Care, PM	☐	☐	☐	☐	☐
Sun 01/28/2018 Flexible Child Care Registration	29	30	31	01	02
Flexible Care, AM	☐	☐	☐		
Flexible Care, PM	☐	☐	☐		

- Make sure to save selected days in each month before moving to the next month.

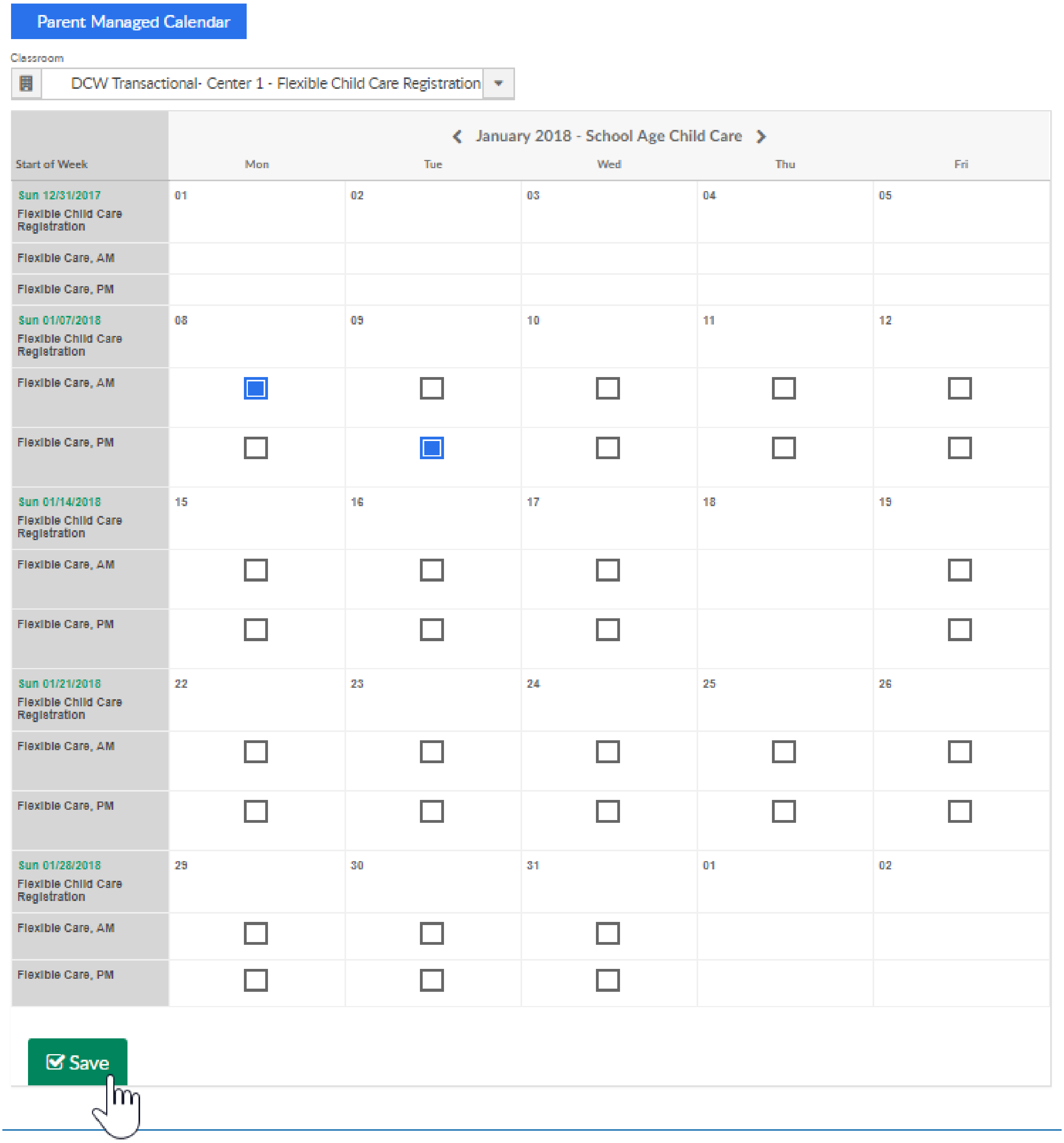


Classroom

DCW Transactional- Center 1 - Flexible Child Care Registration

Start of Week	Mon	Tue	Wed	u	Fri
Sun 12/31/2017 Flexible Child Care Registration	01	02	03	04	05
Flexible Care, AM					

- Once save is selected the blue boxes change to green check marks to show the day has been selected for the child



Parent Managed Calendar

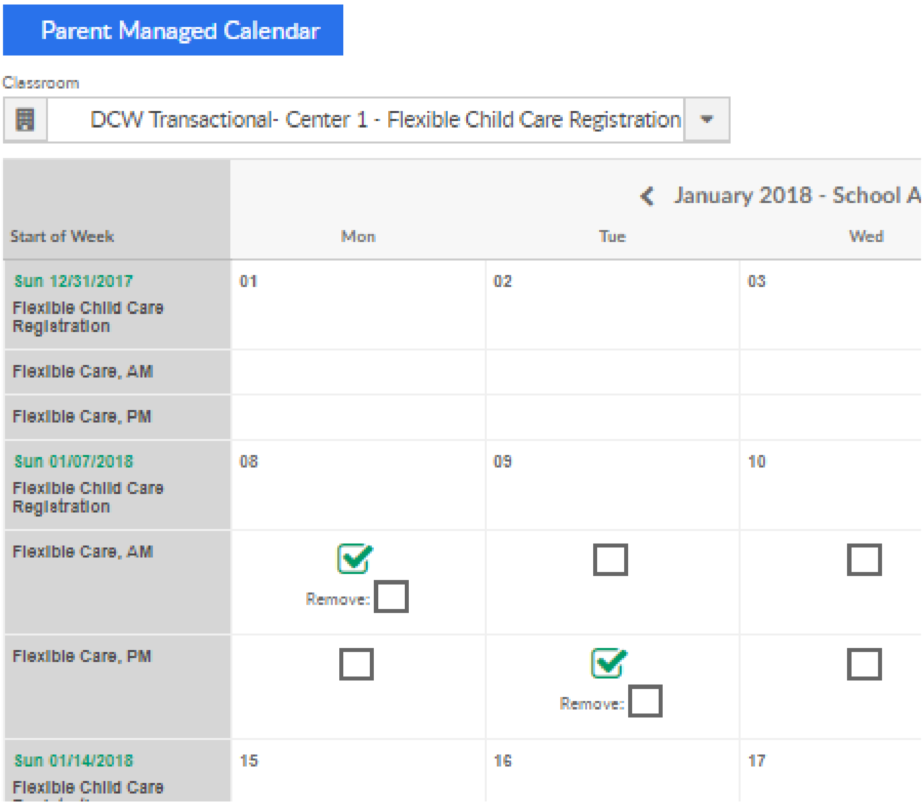
Classroom

DCW Transactional- Center 1 - Flexible Child Care Registration

January 2018 - School Age Child Care

Start of Week	Mon	Tue	Wed	Thu	Fri
Sun 12/31/2017 Flexible Child Care Registration	01	02	03	04	05
Flexible Care, AM					
Flexible Care, PM					
Sun 01/07/2018 Flexible Child Care Registration	08	09	10	11	12
Flexible Care, AM	☑	☐	☐	☐	☐
Flexible Care, PM	☐	☑	☐	☐	☐
Sun 01/14/2018 Flexible Child Care Registration	15	16	17	18	19
Flexible Care, AM	☐	☐	☐		☐
Flexible Care, PM	☐	☐	☐		☐
Sun 01/21/2018 Flexible Child Care Registration	22	23	24	25	26
Flexible Care, AM	☐	☐	☐	☐	☐
Flexible Care, PM	☐	☐	☐	☐	☐
Sun 01/28/2018 Flexible Child Care Registration	29	30	31	01	02
Flexible Care, AM	☐	☐	☐		
Flexible Care, PM	☐	☐	☐		

- To remove a day press the remove box then save. The day will no longer display as selected



Classroom: DCW Transactional- Center 1 - Flexible Child Care Registration

< January 2018 - School A

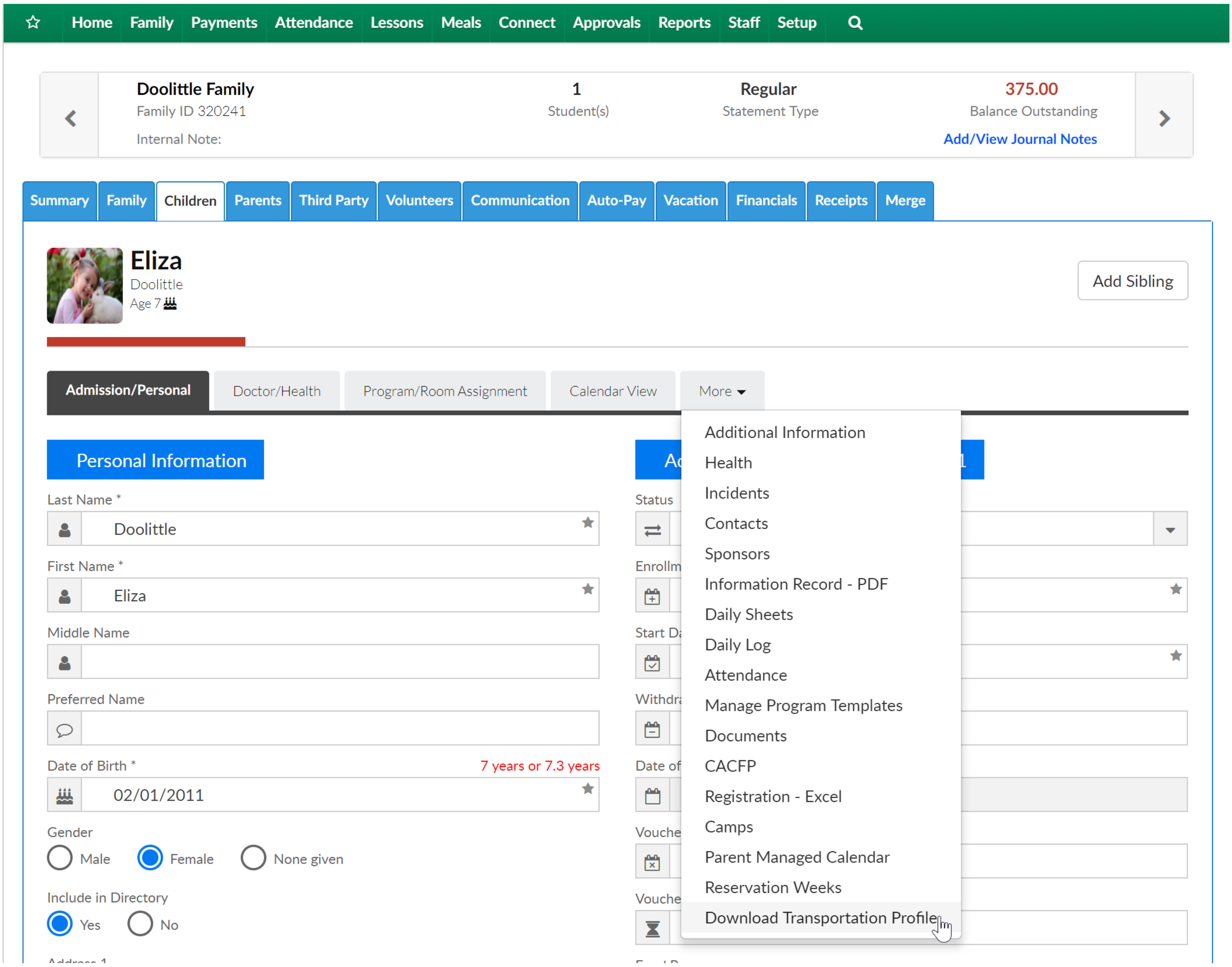
Start of Week	Mon	Tue	Wed
Sun 12/31/2017 Flexible Child Care Registration	01	02	03
Flexible Care, AM			
Flexible Care, PM			
Sun 01/07/2018 Flexible Child Care Registration	08	09	10
Flexible Care, AM	☑ Remove: ☐	☐	☐
Flexible Care, PM	☐	☑ Remove: ☐	☐
Sun 01/14/2018 Flexible Child Care	15	16	17

Family Record, Child Tab- More, Download Transportation Profile

Last Modified on 04/03/2018 8:37 am EDT

The Transportation Profile can be printed for each child in order to display basic demographic information.

From the Child record, select the More menu- then select the Download Transportation Profile option.

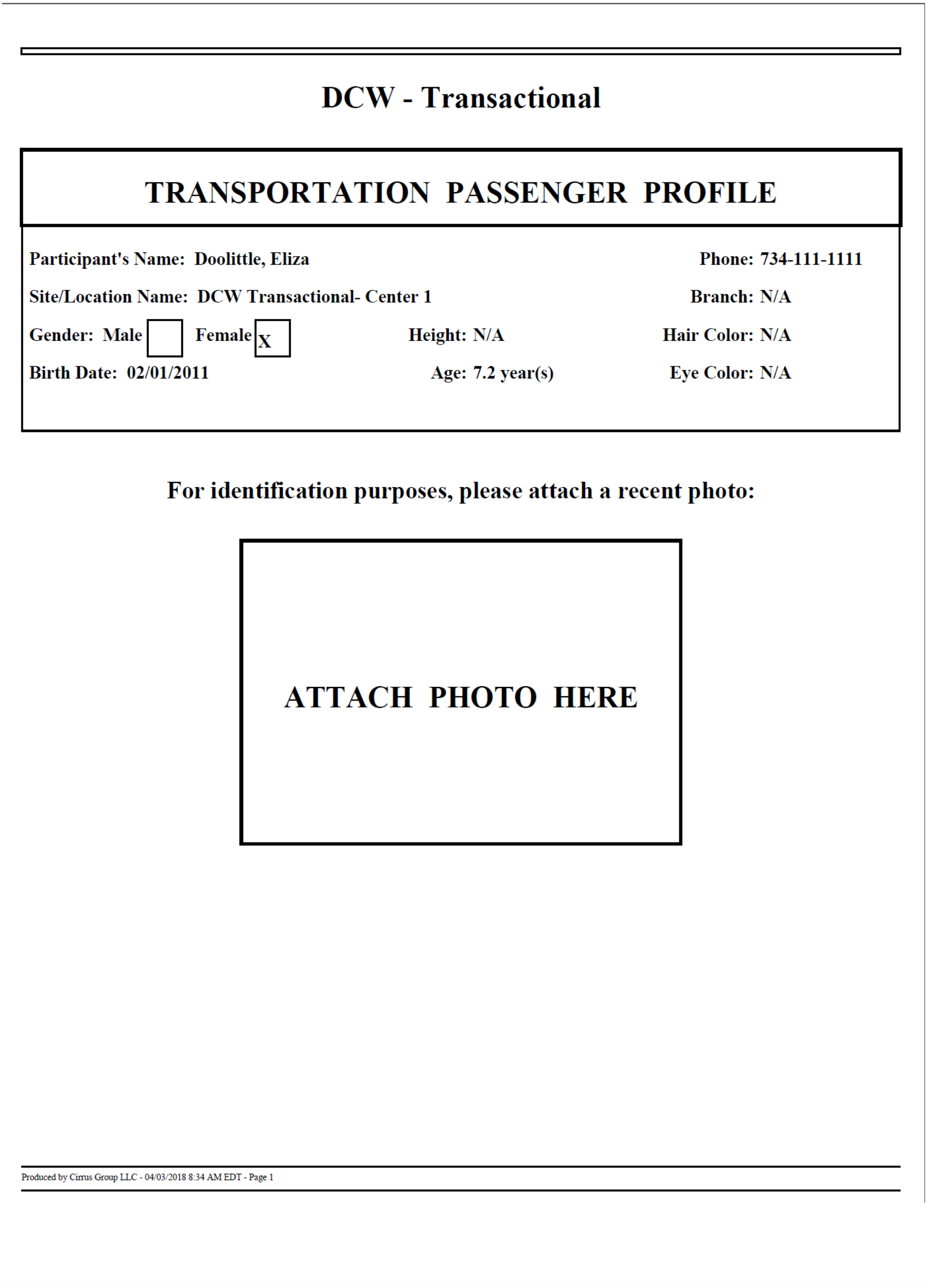


Doolittle Family
Family ID 320241
Internal Note:
1 Student(s)
Regular Statement Type
375.00 Balance Outstanding

Eliza Doolittle, Age 7

Last Name * Doolittle
First Name * Eliza
Middle Name
Preferred Name
Date of Birth * 02/01/2011 — 7 years or 7.3 years
Gender: ○ Male ● Female ○ None given
Include in Directory: ● Yes ○ No

The Transportation Profile will display in PDF format-



DCW - Transactional

TRANSPORTATION PASSENGER PROFILE

Participant's Name: Doolittle, Eliza **Phone:** 734-111-1111

Site/Location Name: DCW Transactional- Center 1 **Branch:** N/A

Gender: Male ☐ Female ☒ **Height:** N/A **Hair Color:** N/A

Birth Date: 02/01/2011 **Age:** 7.2 year(s) **Eye Color:** N/A

For identification purposes, please attach a recent photo:

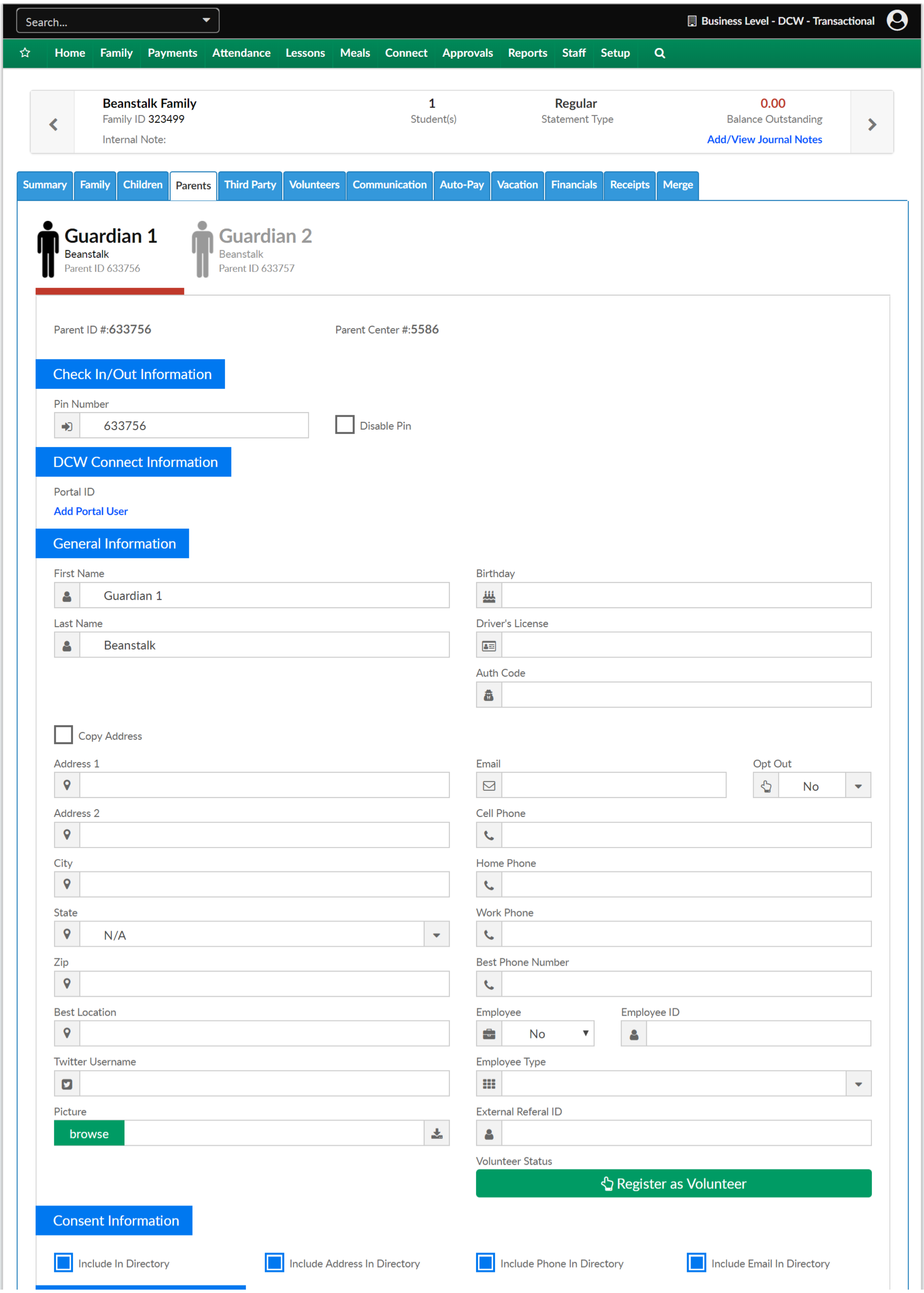
ATTACH PHOTO HERE

Produced by Cirrus Group LLC - 04/03/2018 8:34 AM EDT - Page 1

Family Record, Parents Tab

Last Modified on 12/27/2017 2:14 pm EST

The Parent tab displays parent information for Guardian 1 and 2. Select the icon next to Guardian 1 or 2 to toggle between parents/guardians.



Beanstalk Family
Family ID 323499
Internal Note:

1
Student(s)

Regular
Statement Type

0.00
Balance Outstanding

Add/View Journal Notes

Guardian 1
Beanstalk
Parent ID 633756

Guardian 2
Beanstalk
Parent ID 633757

Parent ID #:633756

Parent Center #:5586

Check In/Out Information

Pin Number: 633756

☐ Disable Pin

DCW Connect Information

Portal ID

Add Portal User

General Information

First Name: Guardian 1

Last Name: Beanstalk

Birthday:

Driver's License:

Auth Code:

☐ Copy Address

Address 1:

Address 2:

City:

State: N/A

Zip:

Best Location:

Twitter Username:

Picture: browse

Email:

Opt Out: No

Cell Phone:

Home Phone:

Work Phone:

Best Phone Number:

Employee: No

Employee ID:

Employee Type:

External Referal ID:

Volunteer Status: Register as Volunteer

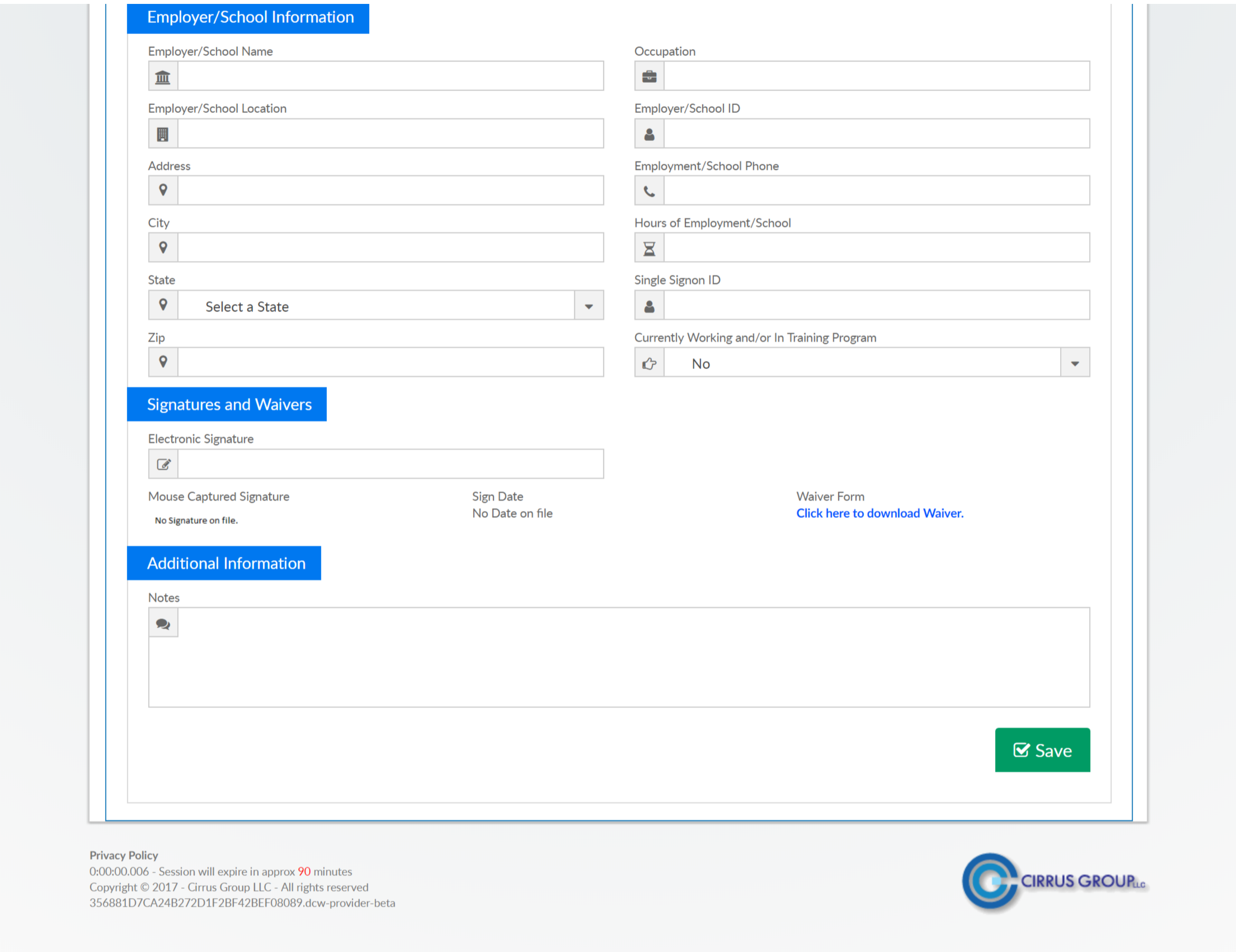
Consent Information

☑ Include In Directory

☑ Include Address In Directory

☑ Include Phone In Directory

☑ Include Email In Directory



Employer/School Information

Employer/School Name

Occupation

Employer/School Location

Employer/School ID

Address

Employment/School Phone

City

Hours of Employment/School

State: Select a State

Single Signon ID

Zip

Currently Working and/or In Training Program: No

Signatures and Waivers

Electronic Signature

Mouse Captured Signature
No Signature on file.

Sign Date
No Date on file

Waiver Form
Click here to download Waiver.

Additional Information

Notes

Privacy Policy
0:00:00.006 - Session will expire in approx 90 minutes
Copyright © 2017 - Cirrus Group LLC - All rights reserved
356881D7CA24B272D1F2BF42BEF08089.dcw-provider-beta

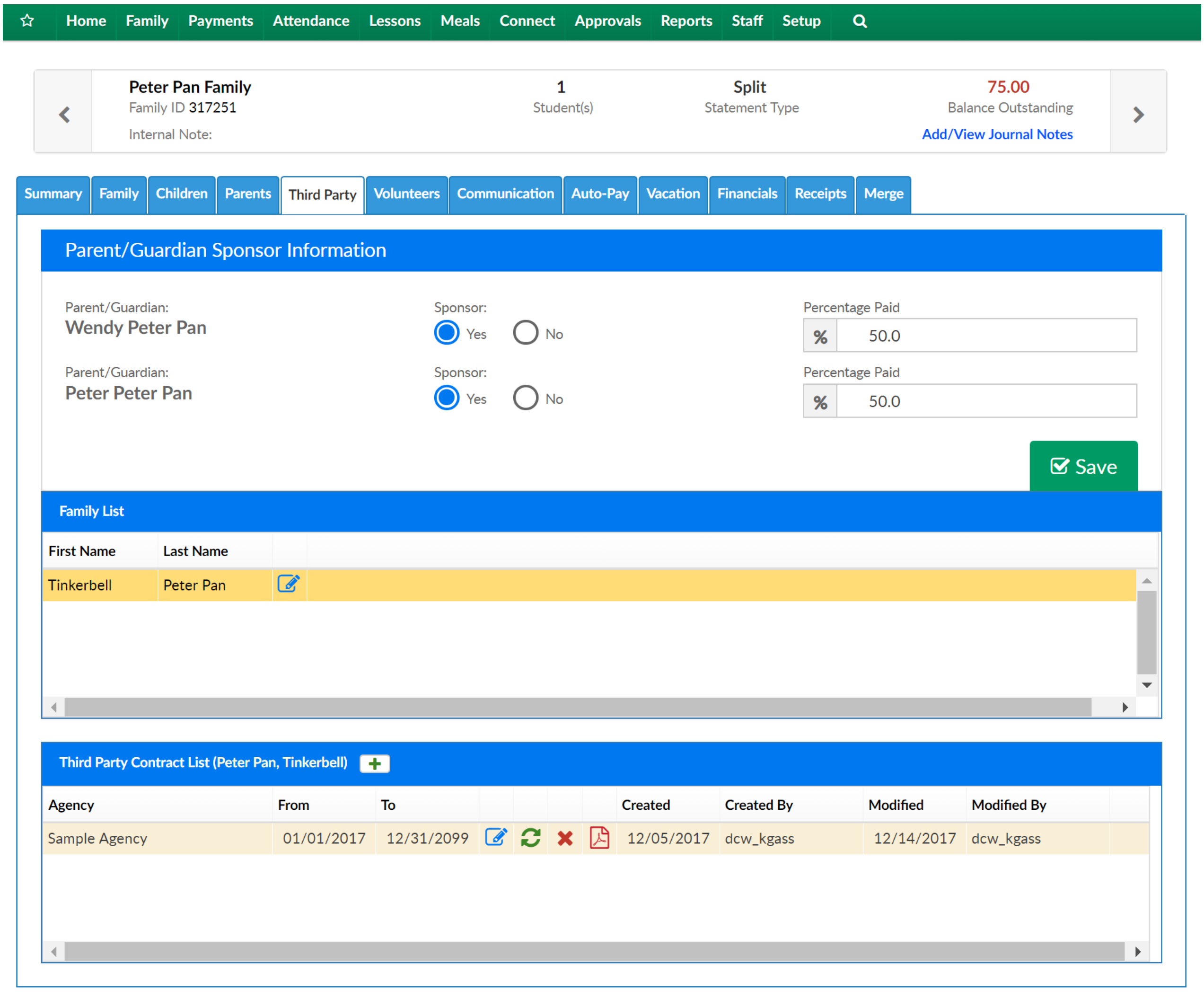
Family Record, Third Party Tab

Last Modified on 01/14/2019 9:22 am EST

The Third Party tab displays split family detail, including the split between parents and any third party contracts associated with the family.

Before detail can be added to either divorced parents or sponsored families, the family must be split. To split the family, select the primary payer's radio button and then select save. Once a family is split they can never have just one ledger on the same account.

If the parent will be paying a portion of the child's fees the Sponsor field radio button should be set to yes for each. The percentage paid should be the portion of 100% the parent would be responsible for. If the family also is sponsored by a third party the percentage paid is in relation to the amount of the copay each parent is responsible for.



Peter Pan Family
Family ID 317251
Internal Note:

1 Student(s)

Split Statement Type

75.00 Balance Outstanding

Add/View Journal Notes

Parent/Guardian Sponsor Information

Parent/Guardian: Wendy Peter Pan
Sponsor: ● Yes ○ No
Percentage Paid: % 50.0

Parent/Guardian: Peter Peter Pan
Sponsor: ● Yes ○ No
Percentage Paid: % 50.0

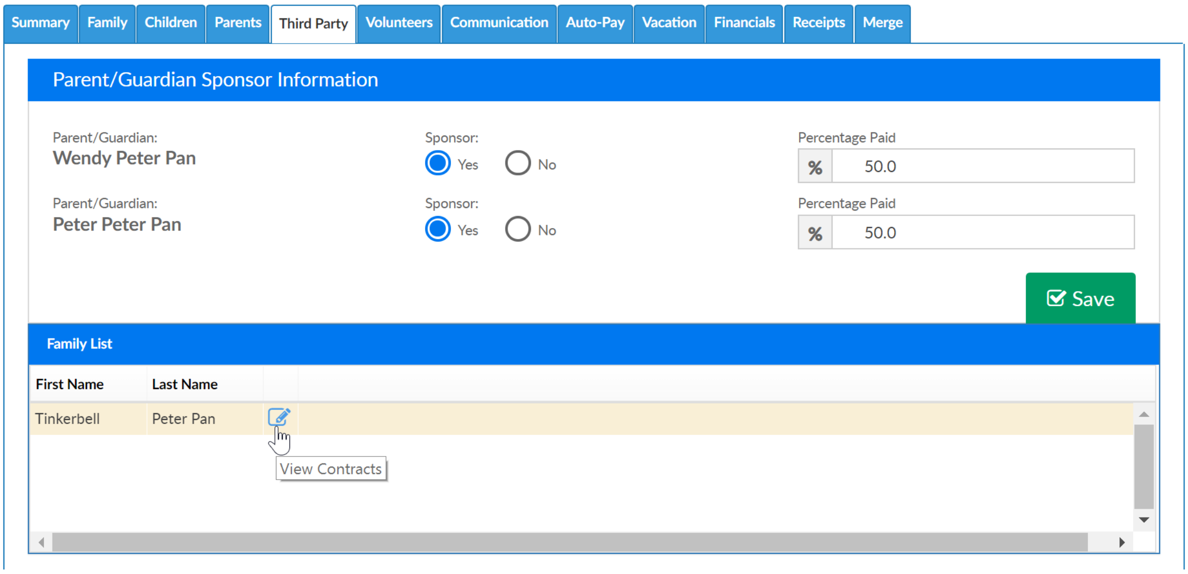
Family List

First Name	Last Name
Tinkerbell	Peter Pan

Third Party Contract List (Peter Pan, Tinkerbell)

Agency	From	To	Created	Created By	Modified	Modified By
Sample Agency	01/01/2017	12/31/2099	12/05/2017	dcw_kgass	12/14/2017	dcw_kgass

Once the family has been split, third party contracts can be added onto the child's record. To add a contract, select the blue square icon with the pencil.



Parent/Guardian Sponsor Information

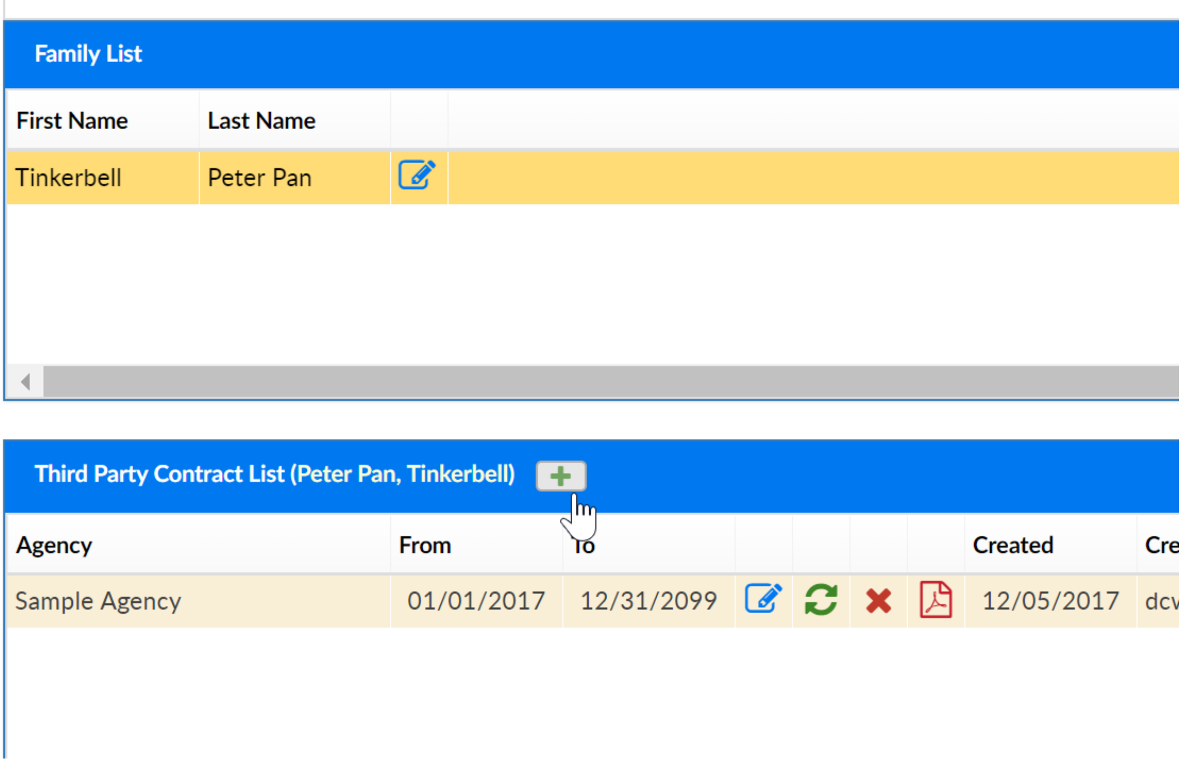
Parent/Guardian: Wendy Peter Pan
Sponsor: ● Yes ○ No
Percentage Paid: % 50.0

Parent/Guardian: Peter Peter Pan
Sponsor: ● Yes ○ No
Percentage Paid: % 50.0

Family List

First Name	Last Name
Tinkerbell	Peter Pan

To add a contract select the + button above the agency list-



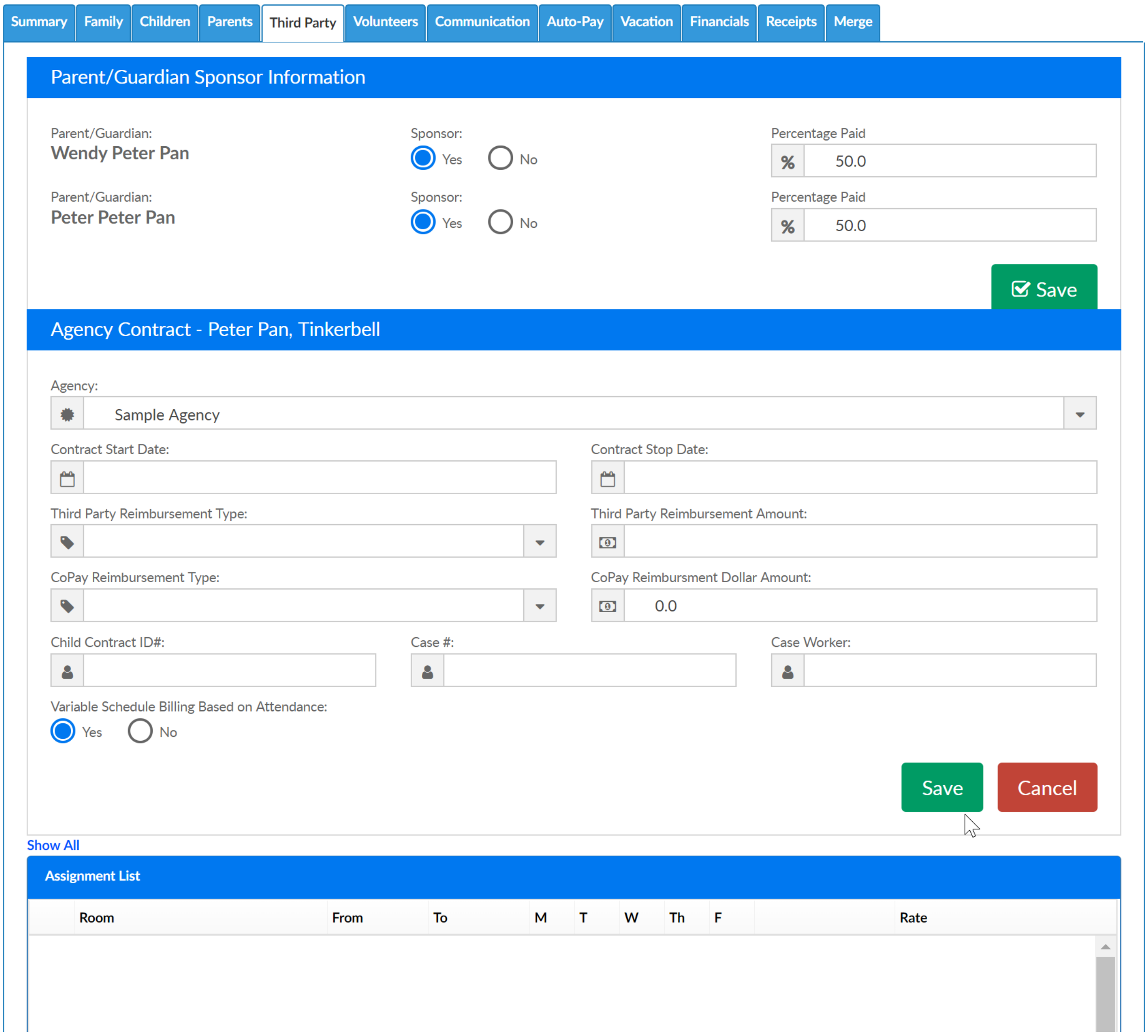
Family List

First Name	Last Name	
Tinkerbell	Peter Pan	

Third Party Contract List (Peter Pan, Tinkerbell)

Agency	From	To					Created	Cre
Sample Agency	01/01/2017	12/31/2099					12/05/2017	dcv

Select the agency from the agency drop down list, add contract detail (the fields displayed on this screen will change based off of the third party's settings). Once detail has been entered press Save.



Parent/Guardian Sponsor Information

Parent/Guardian: Wendy Peter Pan
Sponsor: ● Yes ○ No
Percentage Paid: % 50.0

Parent/Guardian: Peter Peter Pan
Sponsor: ● Yes ○ No
Percentage Paid: % 50.0

Agency Contract - Peter Pan, Tinkerbell

Agency: Sample Agency
Contract Start Date:
Contract Stop Date:
Third Party Reimbursement Type:
Third Party Reimbursement Amount:
CoPay Reimbursement Type:
CoPay Reimbursment Dollar Amount: 0.0
Child Contract ID#:
Case #:
Case Worker:
Variable Schedule Billing Based on Attendance: ● Yes ○ No

Assignment List

Room	From	To	M	T	W	Th	F	Rate

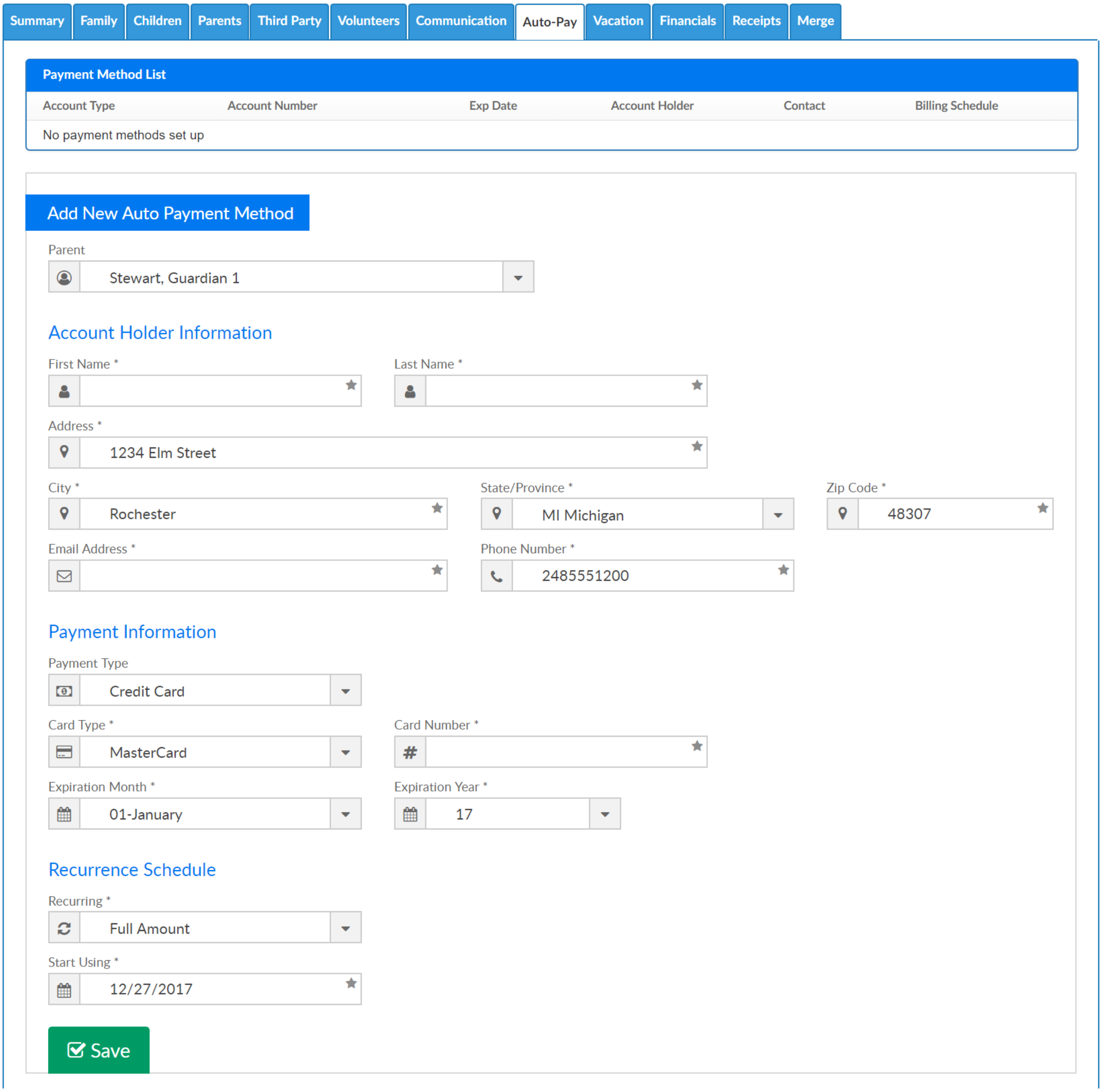
The child's program/room assignments will display in the Assignment Lists box, select the option to Add to Contract if the contract detail should apply to the program/room assignment- then press Save Contract.

When billing is created the detail on the third party tab will ensure the parents are charged their copy (and over market if applicable) and the third party is allocated for the portion of tuition they are covering.

Family Record, Auto-Pay Tab

Last Modified on 12/27/2017 2:13 pm EST

The Auto-Pay tab in the system will display if a parent is registered to have payments deducted from their payment method automatically. The settings around this ability can be found here .



Payment Method List

Account Type	Account Number	Exp Date	Account Holder	Contact	Billing Schedule
No payment methods set up					

Add New Auto Payment Method

Parent: Stewart, Guardian 1

Account Holder Information

First Name *:
Last Name *:
Address *: 1234 Elm Street
City *: Rochester
State/Province *: MI Michigan
Zip Code *: 48307
Email Address *:
Phone Number *: 2485551200

Payment Information

Payment Type: Credit Card
Card Type *: MasterCard
Card Number *:
Expiration Month *: 01-January
Expiration Year *: 17

Recurrence Schedule

Recurring *: Full Amount
Start Using *: 12/27/2017

If a payment method already exists, it will display under the payment method list. From this screen staff/admins can edit or delete an auto-pay method for a parent.

With proper permissions parents are able to self service their auto-pay information from the portal- click here for an overview .

To see all parents who have registered an auto-pay account you can pull the auto-pay holder report.

If payments are set to process automatically, nothing further is required from staff/admin users.. If batches are being created manually, to create an auto-pay batch go to the Payments > AutoPay Batch Screen.

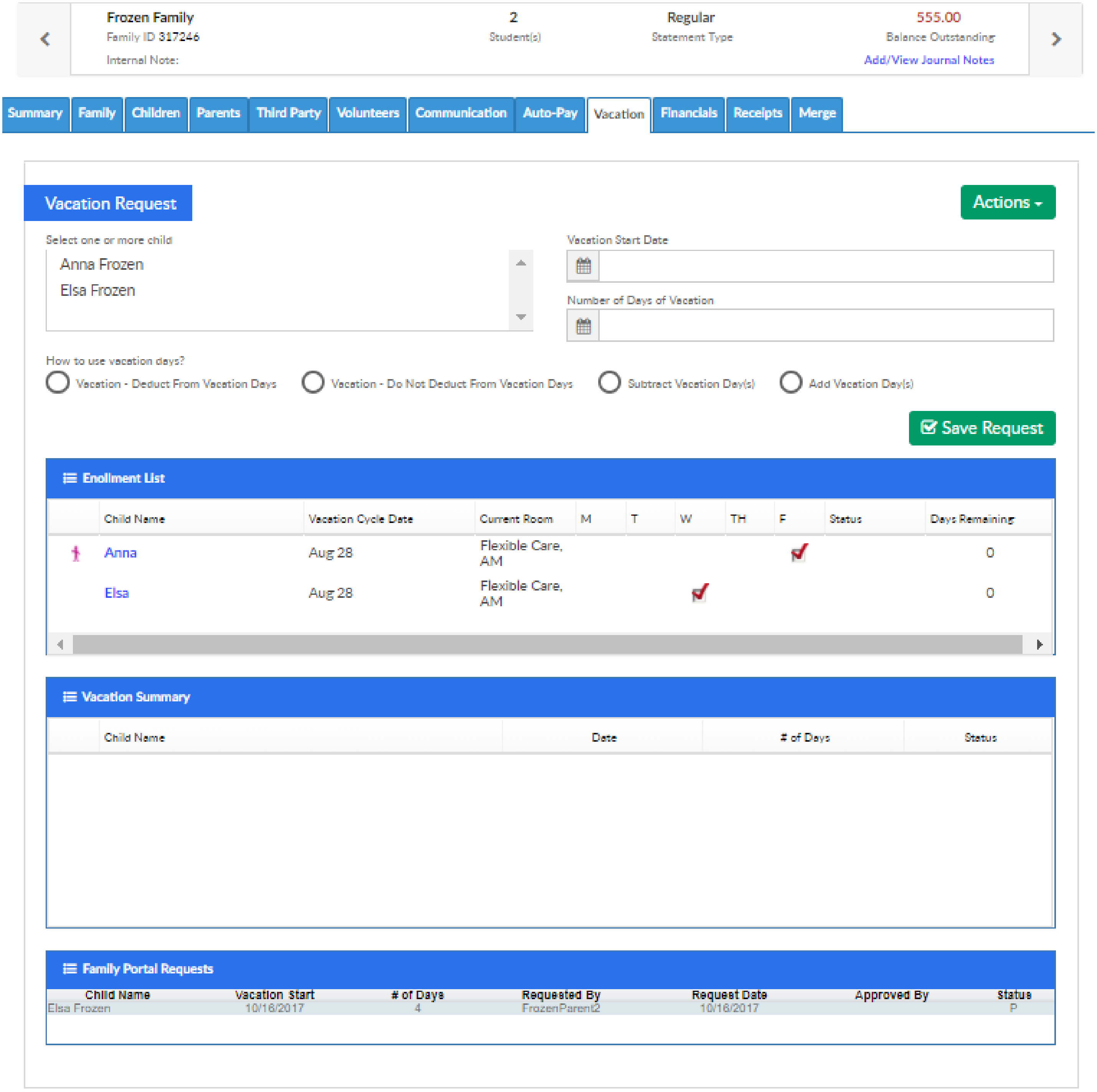
Family Record, Vacation Tab

Last Modified on 01/04/2018 9:35 am EST

The vacation option on the family record allows sites to track vacation or reservation requests. The vacation schedule for a child in the system allows administrators the ability to schedule when a child is going on vacation or going to be absent from the center.

- Vacation can be added day by day, the family will not be charged for vacation days
- Reservation weeks will charge the family 1/2 of the week's tuition for the weeks that are entered

From the Family Record, select the Vacation tab.



Frozen Family
Family ID 317246
Internal Note:

2
Student(s)

Regular
Statement Type

555.00
Balance Outstanding
Add/View Journal Notes

Select one or more child
Anna Frozen
Elsa Frozen

Vacation Start Date

Number of Days of Vacation

How to use vacation days?
○ Vacation - Deduct From Vacation Days ○ Vacation - Do Not Deduct From Vacation Days ○ Subtract Vacation Day(s) ○ Add Vacation Day(s)

Enrollment List

	Child Name	Vacation Cycle Date	Current Room	M	T	W	TH	F	Status	Days Remaining
	Anna	Aug 28	Flexible Care, AM					✓		0
	Elsa	Aug 28	Flexible Care, AM			✓				0

Vacation Summary

	Child Name	Date	# of Days	Status

Family Portal Requests

Child Name	Vacation Start	# of Days	Requested By	Request Date	Approved By	Status
Elsa Frozen	10/16/2017	4	FrozenParent2	10/16/2017		P

To adjust vacation balances for children select the child that will be on vacation in the Select one or more child section. To select multiple children, click on each of the children's names while holding down the Ctrl key on the keyboard.

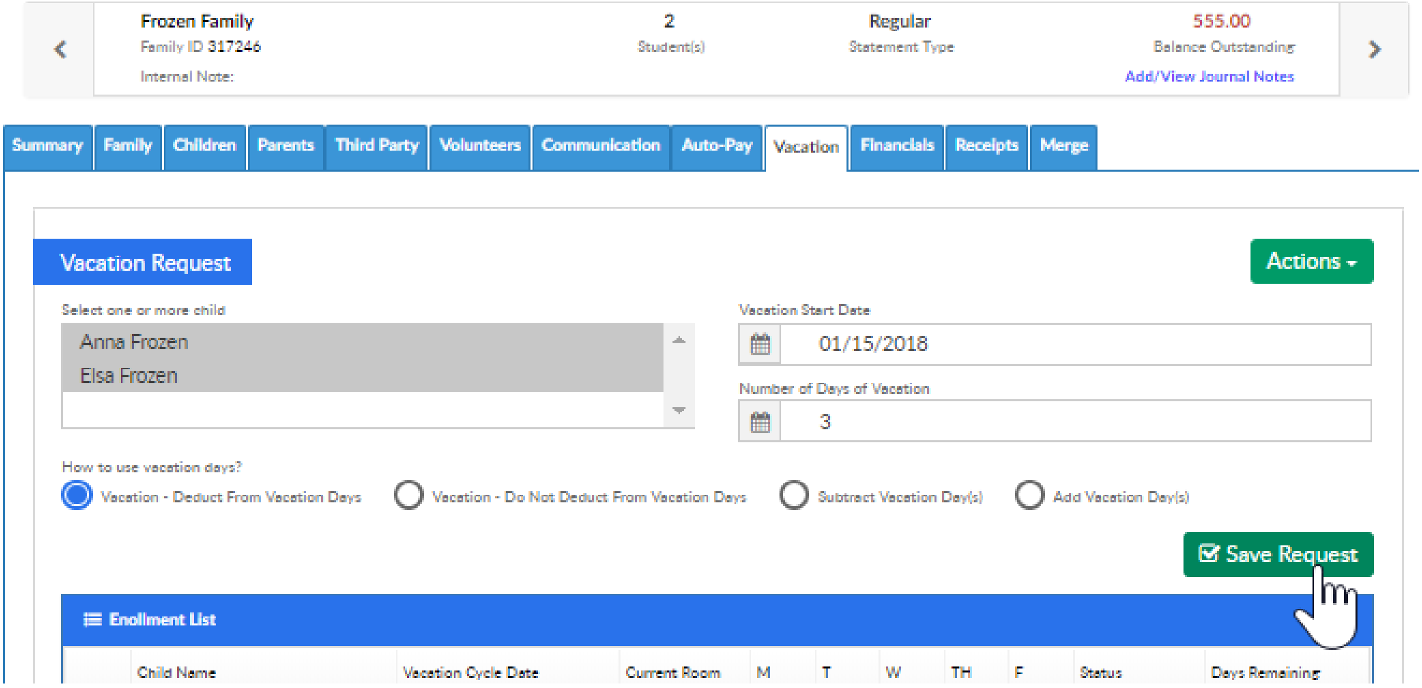
Enter the date the vacation for the child will start in the Enter the first day of vacation text box.

Enter the number of days the child will be on vacation or absent from the center in the Enter the number of vacation days field.

Select the option for the child's vacation days.

- Select Vacation – Deduce From Vacation Days to have the vacation days deducted from the child's allowed vacation days.
- Select Vacation – Do Not Deduct From Vacation Days to have the vacation days not removed from the child's allowed vacation days.
- Select Subtract Vacation Day(s) to remove vacation days from a child without having the child be scheduled on vacation.
- Select Add Vacation Day(s) to add additional vacation days for a child.

When finished, click on the Save Request button.



Frozen Family
Family ID 317246
Internal Note:

2 Student(s)

Regular Statement Type

555.00 Balance Outstanding

Add/View Journal Notes

Select one or more child: Anna Frozen, Elsa Frozen

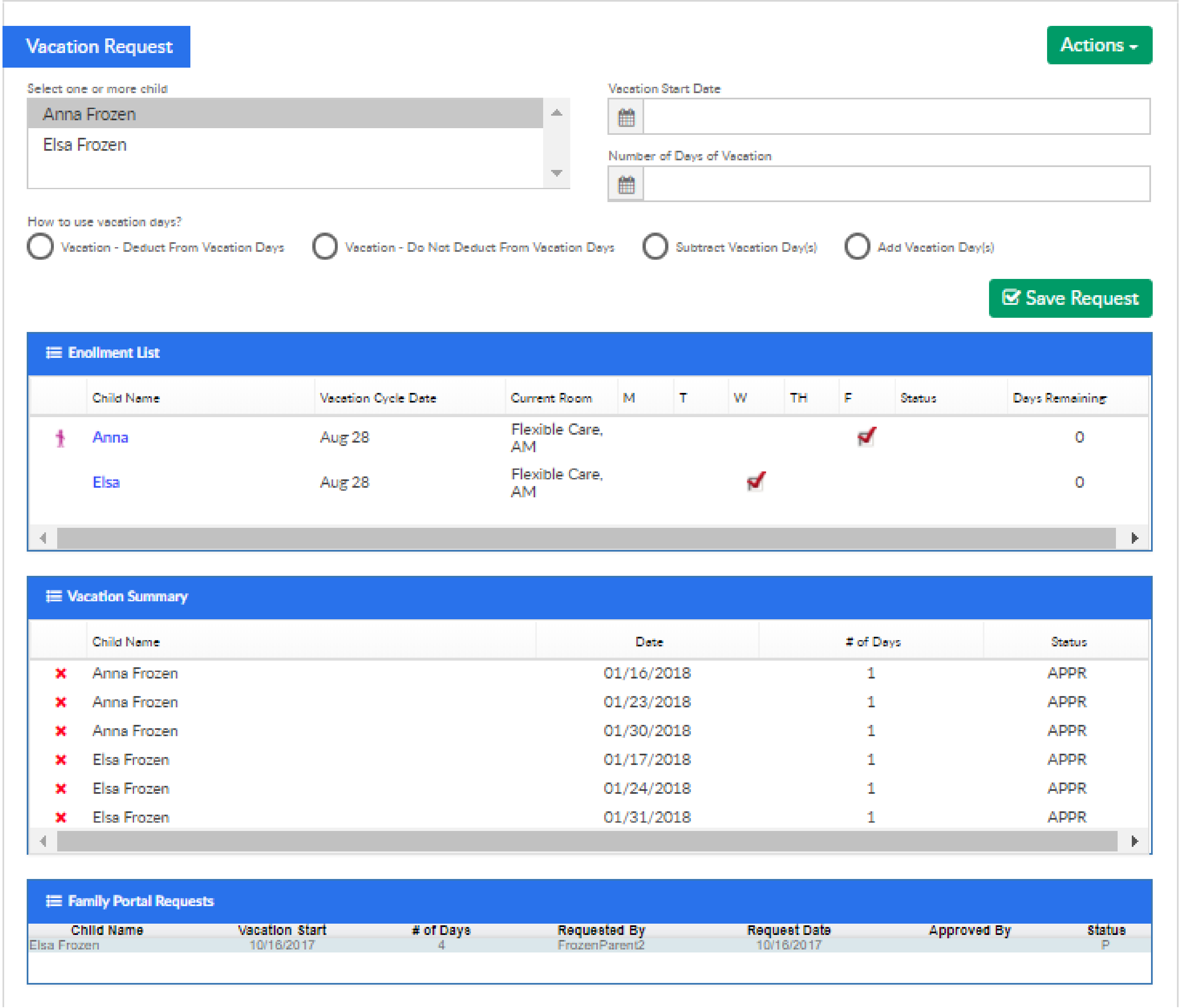
Vacation Start Date: 01/15/2018

Number of Days of Vacation: 3

How to use vacation days?
● Vacation - Deduct From Vacation Days ○ Vacation - Do Not Deduct From Vacation Days ○ Subtract Vacation Day(s) ○ Add Vacation Day(s)

Child Name	Vacation Cycle Date	Current Room	M	T	W	TH	F	Status	Days Remaining

After clicking on the Save Request button, the screen will refresh. The child's vacation schedule will be displayed in the Vacation Summary section.



Enrollment List

	Child Name	Vacation Cycle Date	Current Room	M	T	W	TH	F	Status	Days Remaining
	Anna	Aug 28	Flexible Care, AM					✓		0
	Elsa	Aug 28	Flexible Care, AM			✓				0

Vacation Summary

	Child Name	Date	# of Days	Status
✗	Anna Frozen	01/16/2018	1	APPR
✗	Anna Frozen	01/23/2018	1	APPR
✗	Anna Frozen	01/30/2018	1	APPR
✗	Elsa Frozen	01/17/2018	1	APPR
✗	Elsa Frozen	01/24/2018	1	APPR
✗	Elsa Frozen	01/31/2018	1	APPR

Family Portal Requests

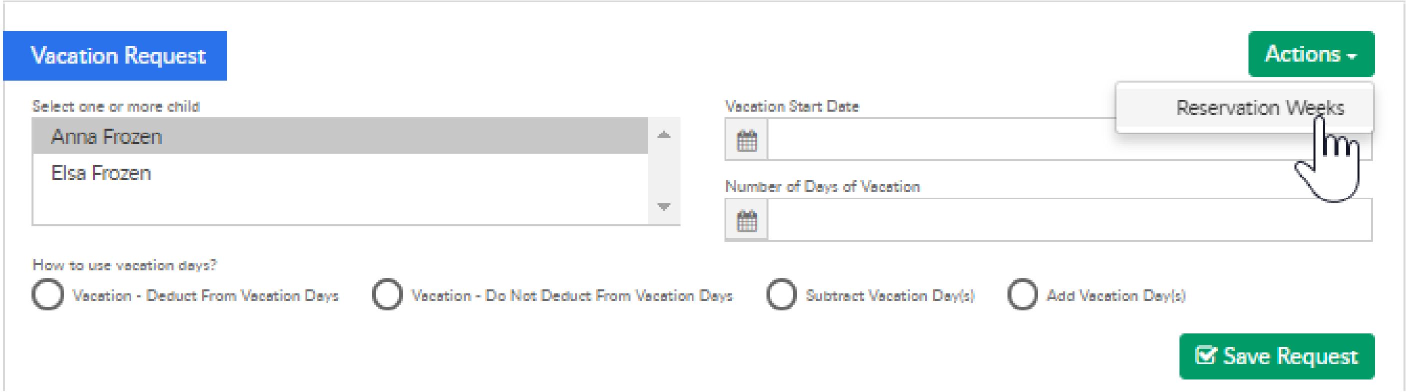
Child Name	Vacation Start	# of Days	Requested By	Request Date	Approved By	Status
Elsa Frozen	10/16/2017	4	FrozenParent2	10/16/2017		P

Enrollment List displays the programs the children are currently enrolled in and their vacation balances.

Vacation Summary displays the vacation days that have been added for the child(ren).

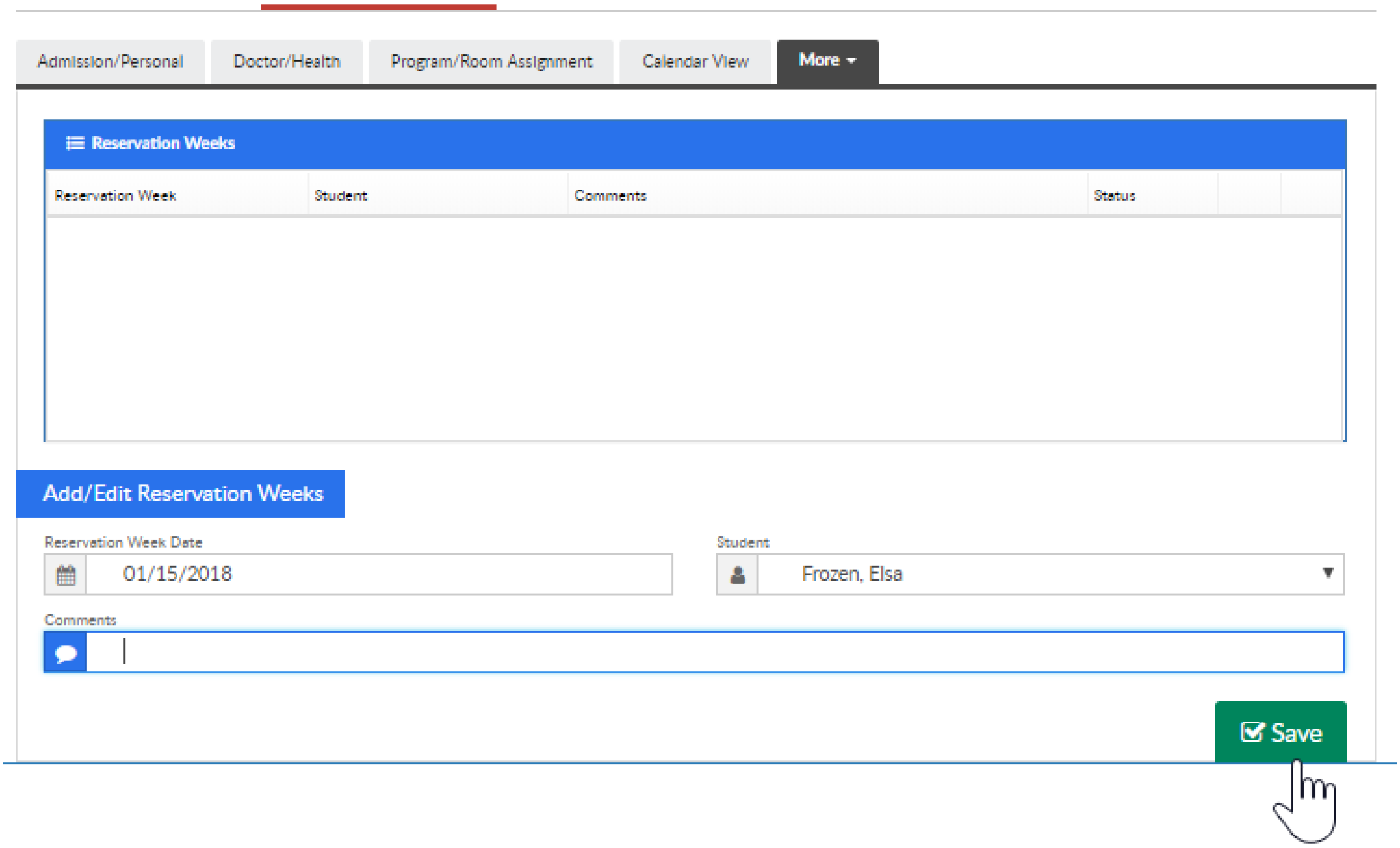
The Family Portal Requests section displays pending requests families have submitted from the portal (if vacation requests are displayed on the Family/Parent/Connect Portal).

If a site tracks reservation weeks, select the Action button, then select Reservation Weeks-



Existing reservation weeks will display in the the Reservation Weeks box.

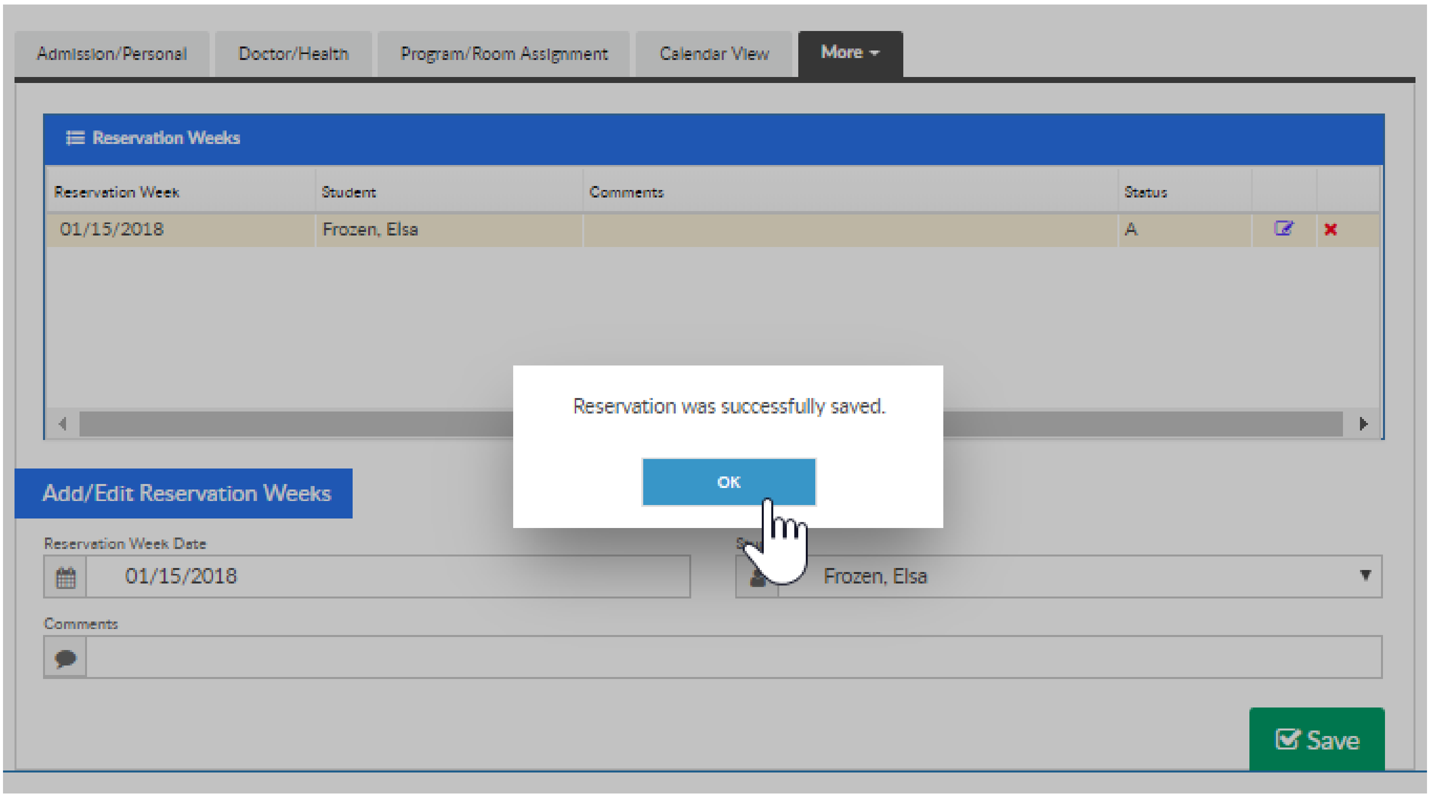
To add a reservation week enter the week start date, select the student and add any notes for the week. Press Save to commit changes.



Reservation Week Date: 01/15/2018

Student: Frozen, Elsa

A confirmation box will display, press OK to continue.



Reservation Weeks

Reservation Week	Student	Comments	Status
01/15/2018	Frozen, Elsa		A

Reservation was successfully saved.

Add/Edit Reservation Weeks

Reservation Week Date: 01/15/2018

Frozen, Elsa

Comments

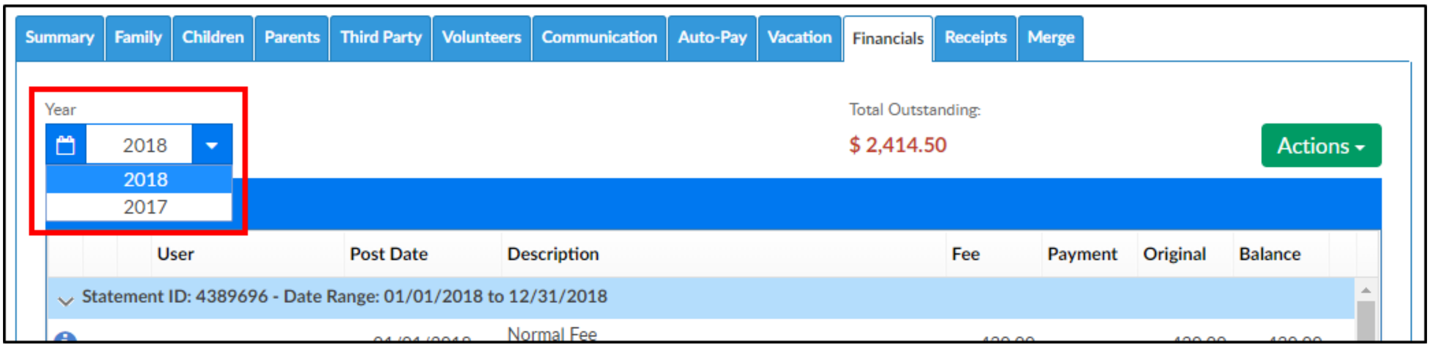
To edit or remove a week select the edit icon (the box with pencil) or the red x to delete.

Family Record, Financials Tab

Last Modified on 01/11/2019 3:31 pm EST

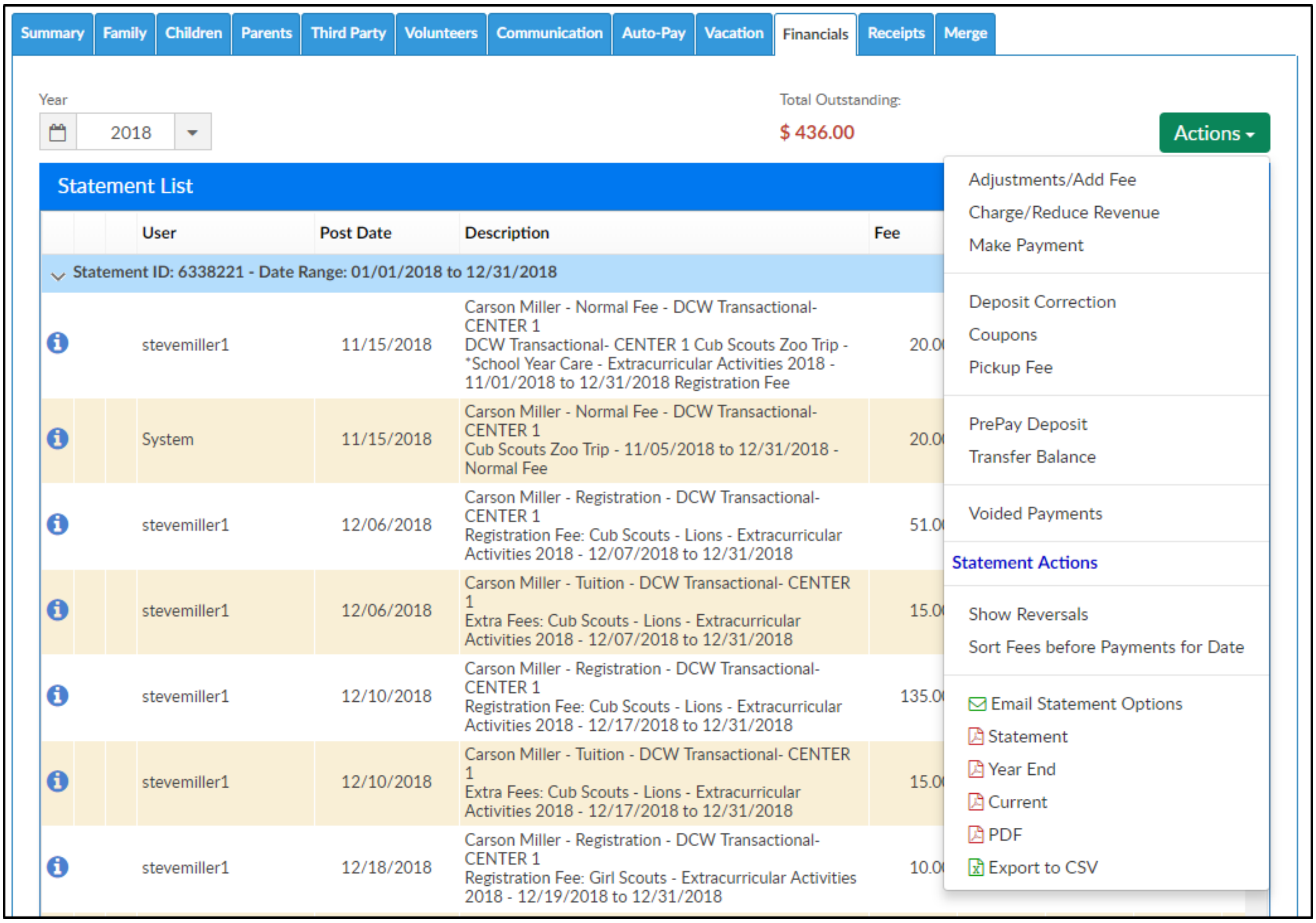
The family Financial tab displays the family's charges, adjustments, and payments. The look of this screen may vary depending on if a site is running defined or transactional billing, but the functionality is generally the same.

To change the statement year, click the Year drop-down box and select the year to display. Once in a new year, users are unable to delete prior year transactions. If a total needs to be corrected, an adjustment/fee would need to be added to the ledger by selecting the Actions button, then select Adjustment/Add Fee.



Actions Menu

There are several options under the Actions menu within the Financials tab. Click on the links below for more information.



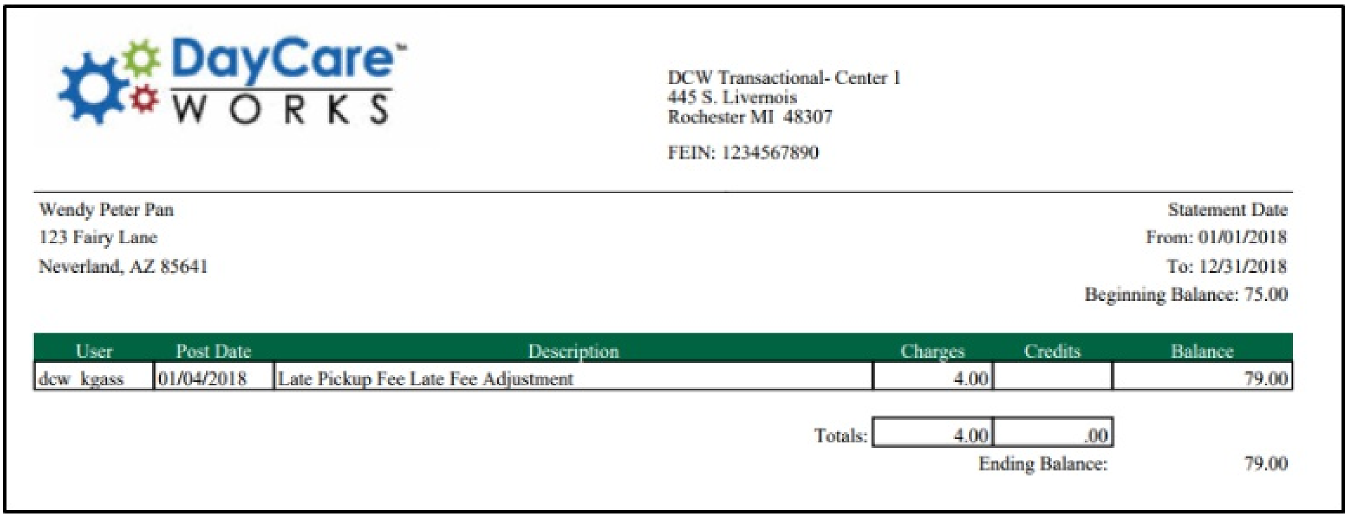
Year: 2018

Total Outstanding: $ 436.00

Statement List

User	Post Date	Description	Fee
Statement ID: 6338221 - Date Range: 01/01/2018 to 12/31/2018			
stevemiller1	11/15/2018	Carson Miller - Normal Fee - DCW Transactional- CENTER 1 DCW Transactional- CENTER 1 Cub Scouts Zoo Trip - *School Year Care - Extracurricular Activities 2018 - 11/01/2018 to 12/31/2018 Registration Fee	20.0
System	11/15/2018	Carson Miller - Normal Fee - DCW Transactional- CENTER 1 Cub Scouts Zoo Trip - 11/05/2018 to 12/31/2018 - Normal Fee	20.0
stevemiller1	12/06/2018	Carson Miller - Registration - DCW Transactional- CENTER 1 Registration Fee: Cub Scouts - Lions - Extracurricular Activities 2018 - 12/07/2018 to 12/31/2018	51.0
stevemiller1	12/06/2018	Carson Miller - Tuition - DCW Transactional- CENTER 1 Extra Fees: Cub Scouts - Lions - Extracurricular Activities 2018 - 12/07/2018 to 12/31/2018	15.0
stevemiller1	12/10/2018	Carson Miller - Registration - DCW Transactional- CENTER 1 Registration Fee: Cub Scouts - Lions - Extracurricular Activities 2018 - 12/17/2018 to 12/31/2018	135.0
stevemiller1	12/10/2018	Carson Miller - Tuition - DCW Transactional- CENTER 1 Extra Fees: Cub Scouts - Lions - Extracurricular Activities 2018 - 12/17/2018 to 12/31/2018	15.0
stevemiller1	12/18/2018	Carson Miller - Registration - DCW Transactional- CENTER 1 Registration Fee: Girl Scouts - Extracurricular Activities 2018 - 12/19/2018 to 12/31/2018	10.0

- Adjustments/Add Fee - add a credit or debit to a family's account
- Charge/Reduce Revenue - add a credit or debit to a family's account
- Make Payment - receipt a payment to a family's account (check, cash, money order)
- Deposit Correction - update a deposit's amount or detail
- Coupons - add a coupon (credit) to a family's ledger
- Pickup Fee - add a late pickup fee to a family's ledger
- Prepay Deposit - accept prepayments for families in the system
- Transfer Balance - move a balance from family to family
- Voided Payments - view payments that have been voided
- Show Reversals - view any payment reversals
- Email Statement Options
- Statement - enter the Customer Statement Criteria to pull a statement for the family



DCW Transactional- Center 1
445 S. Livernois
Rochester MI 48307

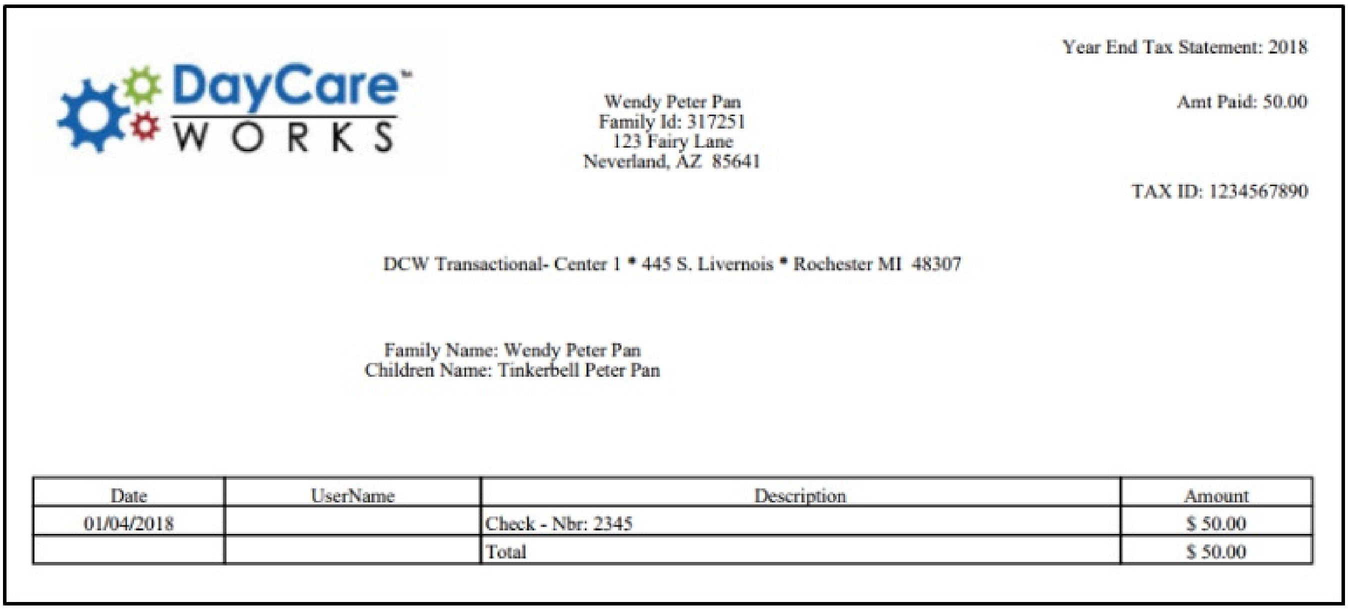
FEIN: 1234567890

Wendy Peter Pan
123 Fairy Lane
Neverland, AZ 85641

Statement Date
From: 01/01/2018
To: 12/31/2018
Beginning Balance: 75.00

User	Post Date	Description	Charges	Credits	Balance
dcw_kgass	01/04/2018	Late Pickup Fee Late Fee Adjustment	4.00		79.00
		Totals:	4.00	.00	
			Ending Balance:		79.00

- Year End - pull a year end payment statement for the family. If no payments have been received for the year selected, the statement will display as blank (no detail)



Year End Tax Statement: 2018

Wendy Peter Pan
Family Id: 317251
123 Fairy Lane
Neverland, AZ 85641

Amt Paid: 50.00

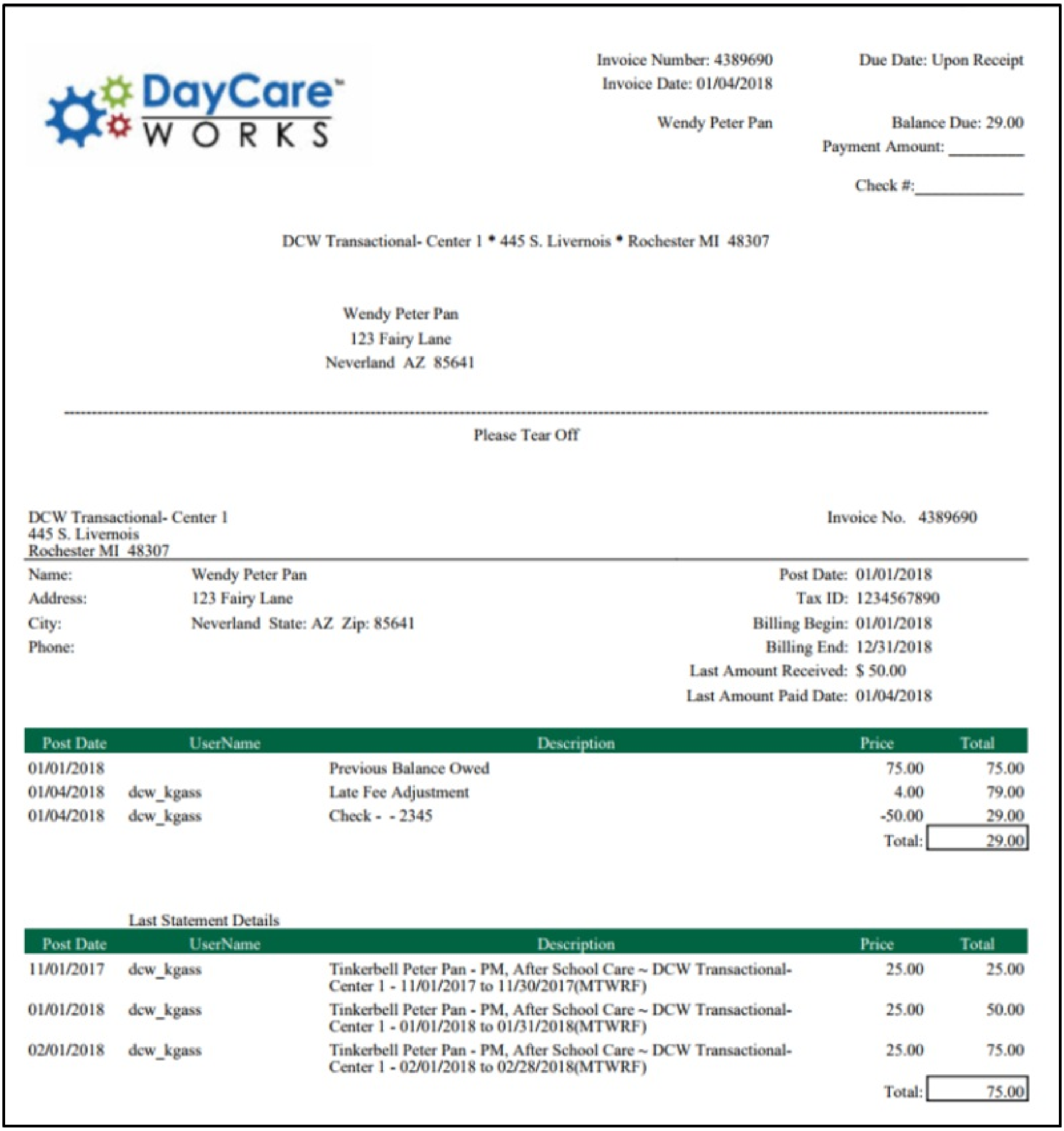
TAX ID: 1234567890

DCW Transactional- Center 1 * 445 S. Livernois * Rochester MI 48307

Family Name: Wendy Peter Pan
Children Name: Tinkerbell Peter Pan

Date	UserName	Description	Amount
01/04/2018		Check - Nbr: 2345	$ 50.00
		Total	$ 50.00

- Current - displays current and prior statement detail. **Please Note**: this will be most useful for defined billing clients



Invoice Number: 4389690
Invoice Date: 01/04/2018
Due Date: Upon Receipt

Wendy Peter Pan
Balance Due: 29.00
Payment Amount: ________
Check #:__________

DCW Transactional- Center 1 • 445 S. Livernois • Rochester MI 48307

Wendy Peter Pan
123 Fairy Lane
Neverland AZ 85641

Please Tear Off

DCW Transactional- Center 1
445 S. Livernois
Rochester MI 48307

Invoice No. 4389690

Name:	Wendy Peter Pan	Post Date:	01/01/2018
Address:	123 Fairy Lane	Tax ID:	1234567890
City:	Neverland State: AZ Zip: 85641	Billing Begin:	01/01/2018
Phone:		Billing End:	12/31/2018
		Last Amount Received:	$ 50.00
		Last Amount Paid Date:	01/04/2018

Post Date	UserName	Description	Price	Total
01/01/2018		Previous Balance Owed	75.00	75.00
01/04/2018	dcw_kgass	Late Fee Adjustment	4.00	79.00
01/04/2018	dcw_kgass	Check - - 2345	-50.00	29.00
			Total:	29.00

Last Statement Details

Post Date	UserName	Description	Price	Total
11/01/2017	dcw_kgass	Tinkerbell Peter Pan - PM, After School Care ~ DCW Transactional- Center 1 - 11/01/2017 to 11/30/2017(MTWRF)	25.00	25.00
01/01/2018	dcw_kgass	Tinkerbell Peter Pan - PM, After School Care ~ DCW Transactional- Center 1 - 01/01/2018 to 01/31/2018(MTWRF)	25.00	50.00
02/01/2018	dcw_kgass	Tinkerbell Peter Pan - PM, After School Care ~ DCW Transactional- Center 1 - 02/01/2018 to 02/28/2018(MTWRF)	25.00	75.00
			Total:	75.00

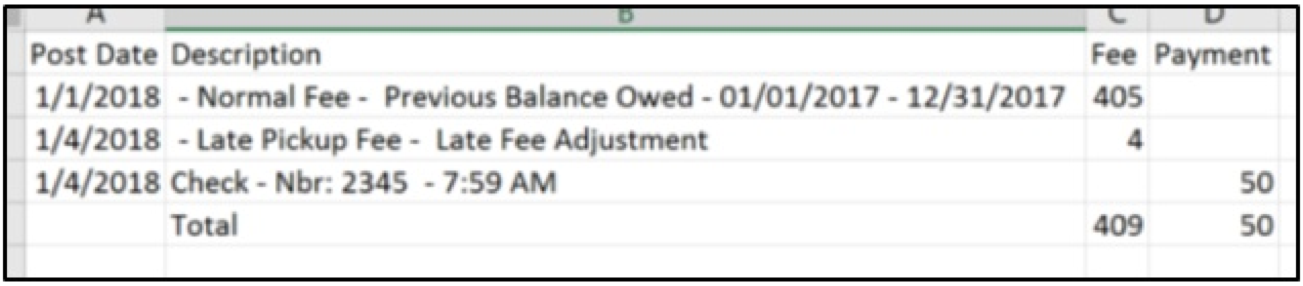
- PDF - family statement detail displayed with less detail in a PDF format

DCW - Transactional
445 S. Livernois
Rochester MI 48307

Payment

Post Date	UserName	Description	Fee	Payment
01/01/2018		- Previous Balance Owed -	75.00	
01/01/2018	dcw_kgass	- Late Pickup Fee - Late Fee Adjustment	4.00	
01/04/2018	dcw_kgass	Check - Nbr: 2345 - 7:59 AM		50.00

- Export to CSV - excel version of the statement



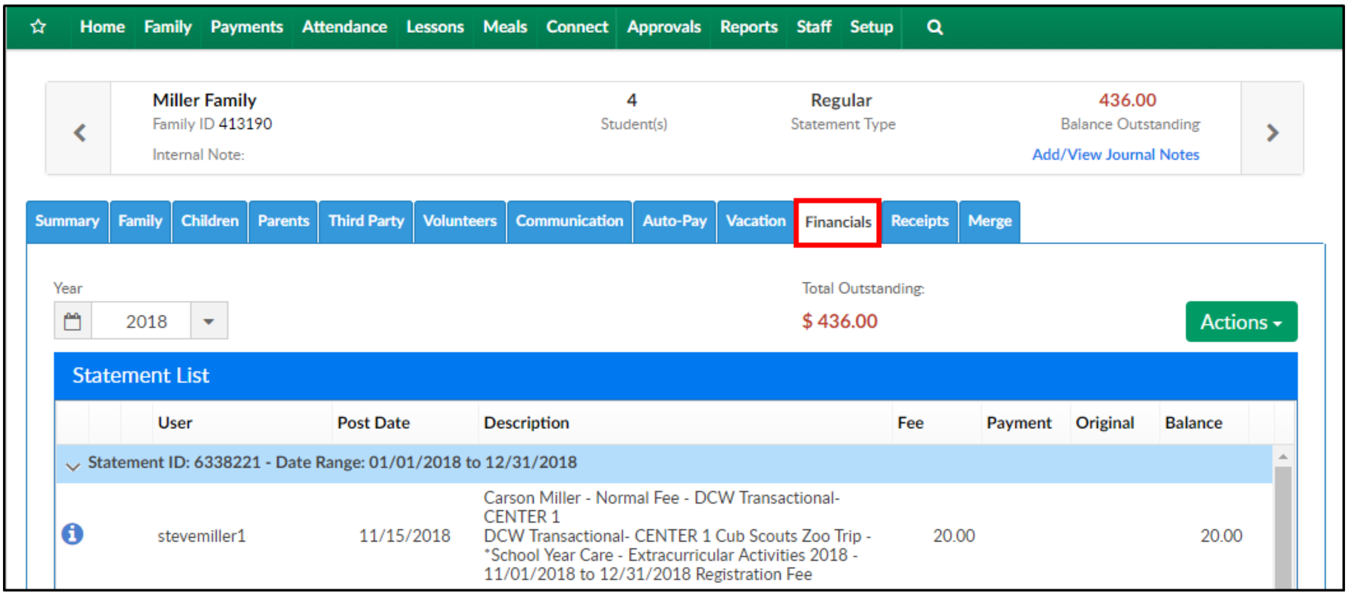
Post Date	Description	Fee	Payment
1/1/2018	- Normal Fee - Previous Balance Owed - 01/01/2017 - 12/31/2017	405	
1/4/2018	- Late Pickup Fee - Late Fee Adjustment	4	
1/4/2018	Check - Nbr: 2345 - 7:59 AM		50
	Total	409	50

Family Record, Financials Tab - Adjustments/Add Fee

Last Modified on 01/09/2019 3:45 pm EST

There are several ways a credit (adjustment) or a fee could be added to a family's account. If the adjustment/fee needs to be added for only one family, follow the steps below:

1. Navigate to the family record, then select the Financials tab

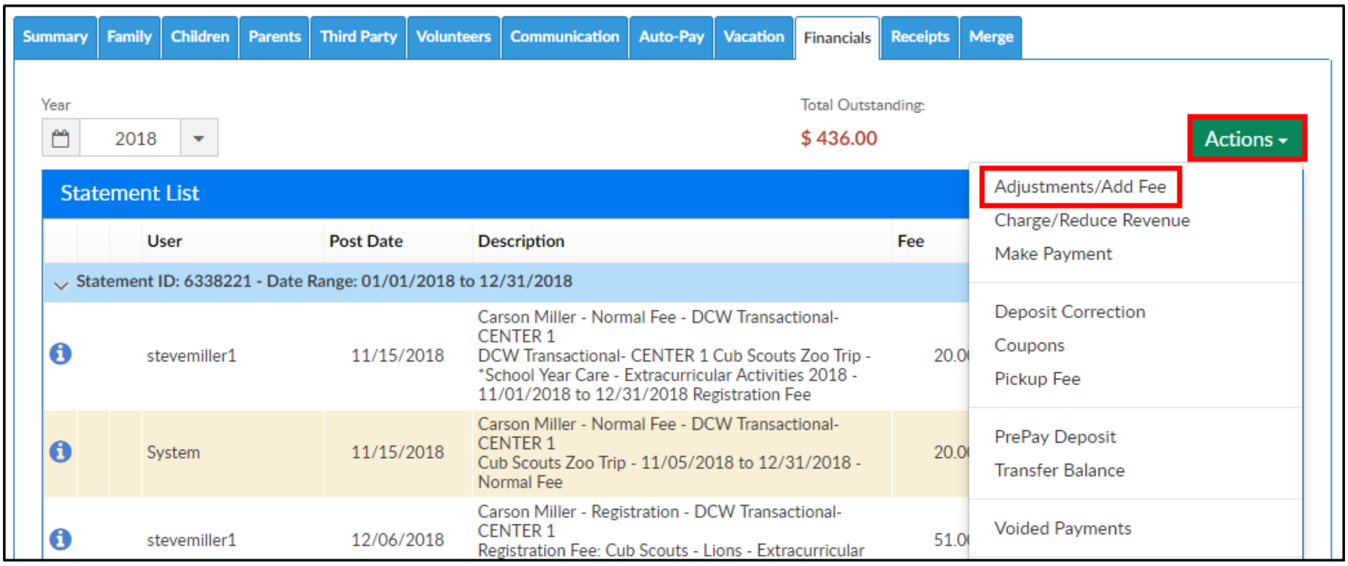


Miller Family
Family ID 413190
Internal Note:
4 Student(s)
Regular Statement Type
436.00 Balance Outstanding
Add/View Journal Notes

Year 2018
Total Outstanding: $ 436.00

User	Post Date	Description	Fee	Payment	Original	Balance
Statement ID: 6338221 - Date Range: 01/01/2018 to 12/31/2018						
stevemiller1	11/15/2018	Carson Miller - Normal Fee - DCW Transactional- CENTER 1 DCW Transactional- CENTER 1 Cub Scouts Zoo Trip - *School Year Care - Extracurricular Activities 2018 - 11/01/2018 to 12/31/2018 Registration Fee	20.00			20.00

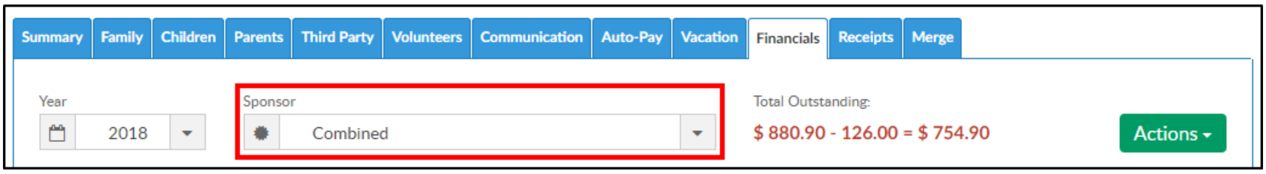
2. Click Actions, then select Adjustments/Add Fee



Year 2018
Total Outstanding: $ 436.00

User	Post Date	Description	Fee
Statement ID: 6338221 - Date Range: 01/01/2018 to 12/31/2018			
stevemiller1	11/15/2018	Carson Miller - Normal Fee - DCW Transactional- CENTER 1 DCW Transactional- CENTER 1 Cub Scouts Zoo Trip - *School Year Care - Extracurricular Activities 2018 - 11/01/2018 to 12/31/2018 Registration Fee	20.0
System	11/15/2018	Carson Miller - Normal Fee - DCW Transactional- CENTER 1 Cub Scouts Zoo Trip - 11/05/2018 to 12/31/2018 - Normal Fee	20.0
stevemiller1	12/06/2018	Carson Miller - Registration - DCW Transactional- CENTER 1 Registration Fee: Cub Scouts - Lions - Extracurricular	51.0

   - Split Families - if an adjustment needs to be added to a split family, the Adjustment/Add Fee option is not available if the Sponsor drop-down is set to Combined. Use the drop-down to select a parent/agency, then navigate to the Actions menu

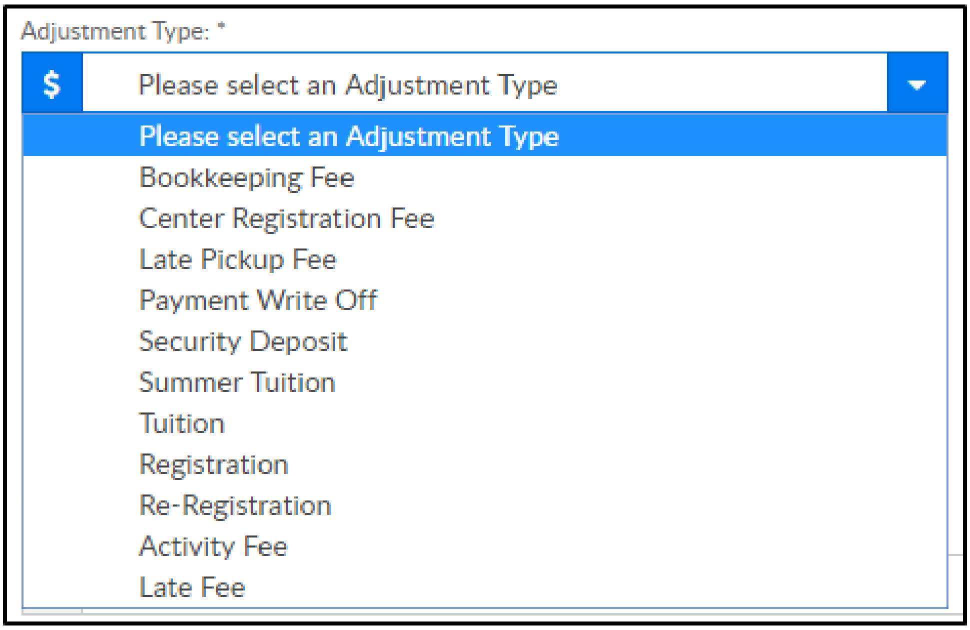


Year 2018

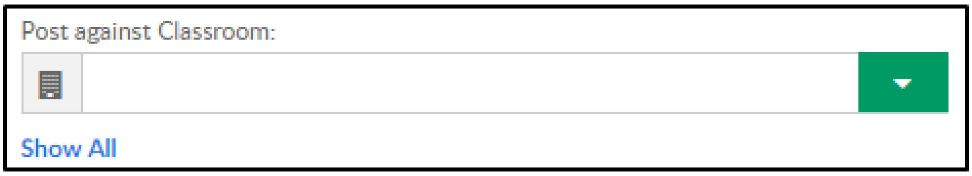
Sponsor Combined

Total Outstanding: $ 880.90 - 126.00 = $ 754.90

3. Adjustment Type - select the adjustment type from the drop-down menu. **Please Note**: this list is populated from valid values that have been setup. The type of adjustment selected will impact the GL detail (if setup) and will help to class the type of transaction that users have created. Adjustment types can be generic or specific depending on reporting requirements


Adjustment Type: * Please select an Adjustment Type

4. Adjustment Amount - enter the amount that will be debited or credited to the account. **Please Note**: to create a balance due, enter a positive number; to create a credit, enter a negative number
5. Post Date - select the date the transaction will post from the calendar. Best Practice: only use dates within the current month, this would ensure closed reconciliations from prior months are not impacted
6. Student/Child - select which student's record this adjustment should be tied to
7. Due Date - if there is a due date tied to the fee, select the due date from the calendar
8. Post Against Classroom - select which room the debit or credit should be tied to. If no room displays, but the student has a current, prior, future room assignment, click Show All. **Best Practice**: always select a room and schedule to ensure proper allocation of the credit/fee


Post against Classroom:

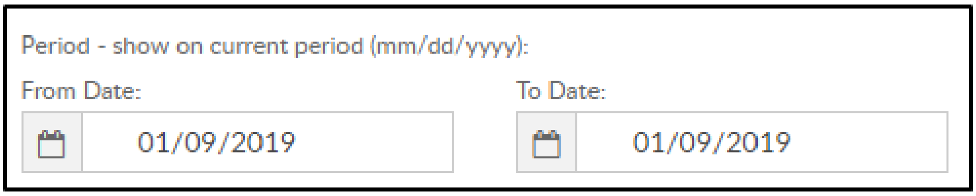
9. Schedule - select the time frame of the room that should be associated to the transaction. If no schedule displays, click Show All. **Best Practice**: always select a room and schedule to ensure proper allocation of the credit/fee


Schedule: Not Selected

10. Notes - enter any notes for the transaction; these notes will display for parent on the financial statement
11. Do Not Show Adjustment Type Label - this will hide the type of adjustment that was selected on the family statement


☐ Do Not Show Adjustment Type Label

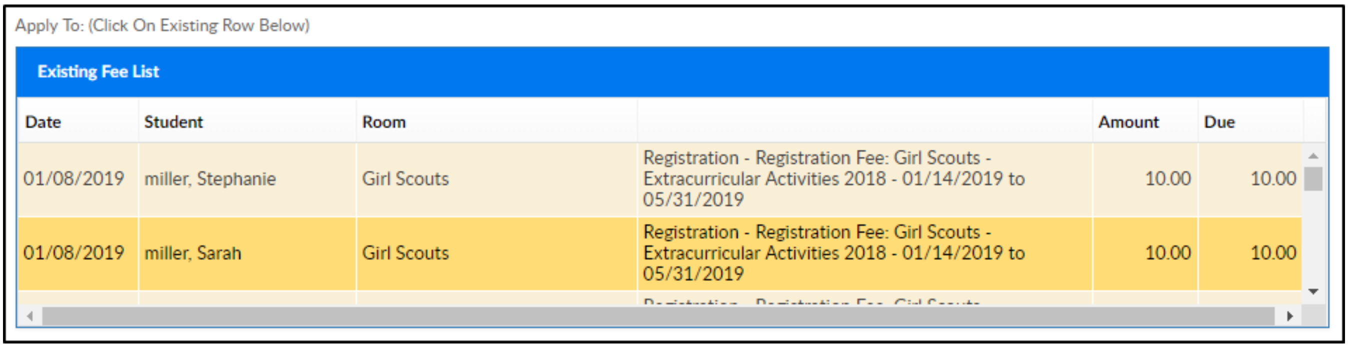
12. Number of Units - enter the number of units if the adjustment is related to items
13. From Date/To Date - **Best Practice**: leave the default


Period - show on current period (mm/dd/yyyy):

From Date: 01/09/2019

To Date: 01/09/2019

14. Existing Fee List - to allocate to a specific line item, click the transaction displayed in this section. **Please Note**: this is optional


Apply To: (Click On Existing Row Below)

Existing Fee List

Date	Student	Room		Amount	Due
01/08/2019	miller, Stephanie	Girl Scouts	Registration - Registration Fee: Girl Scouts - Extracurricular Activities 2018 - 01/14/2019 to 05/31/2019	10.00	10.00
01/08/2019	miller, Sarah	Girl Scouts	Registration - Registration Fee: Girl Scouts - Extracurricular Activities 2018 - 01/14/2019 to 05/31/2019	10.00	10.00

15. Click Save. The adjustment/fee can now be viewed on the family's financial screen. If a statement needs to be sent to the family, navigate to Payments > Outstanding

Family Record, Financials Tab - Charge/Reduce Revenue

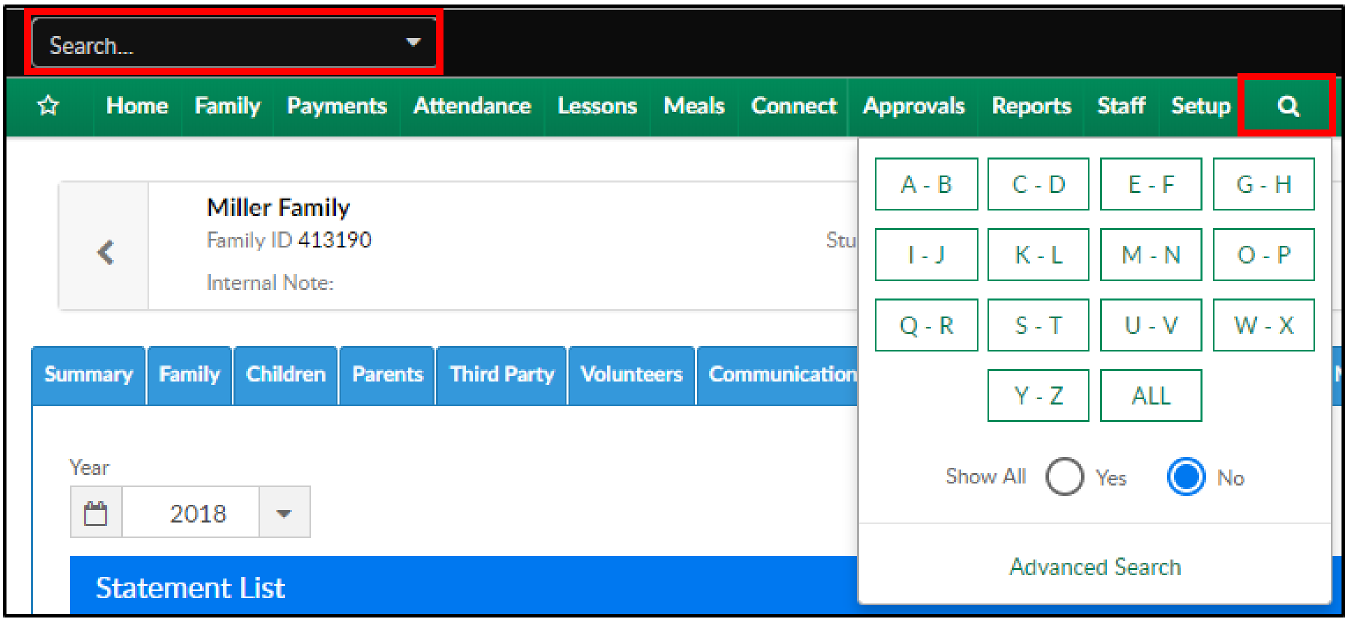
Last Modified on 01/10/2019 10:35 am EST

The Charge/Reduce Revenue option allows administrators to simplify adjustments made to financial ledgers for families within the system. Using this method administrators can select what Type - Fee Valid Values can be setup in the system and have charge revenue.

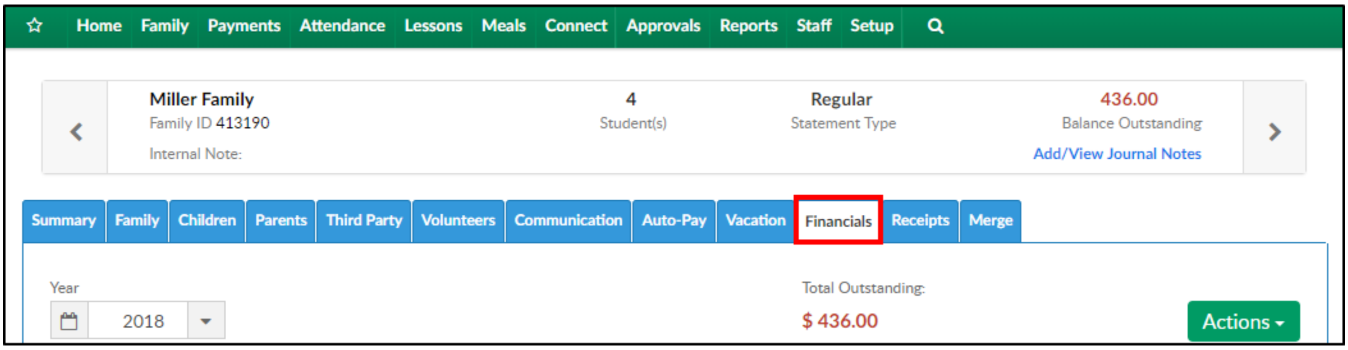
Please Note: when setting up the Type - Fee Valid Values, the Revenue Adjustment Category must be selected.

Charge Revenue

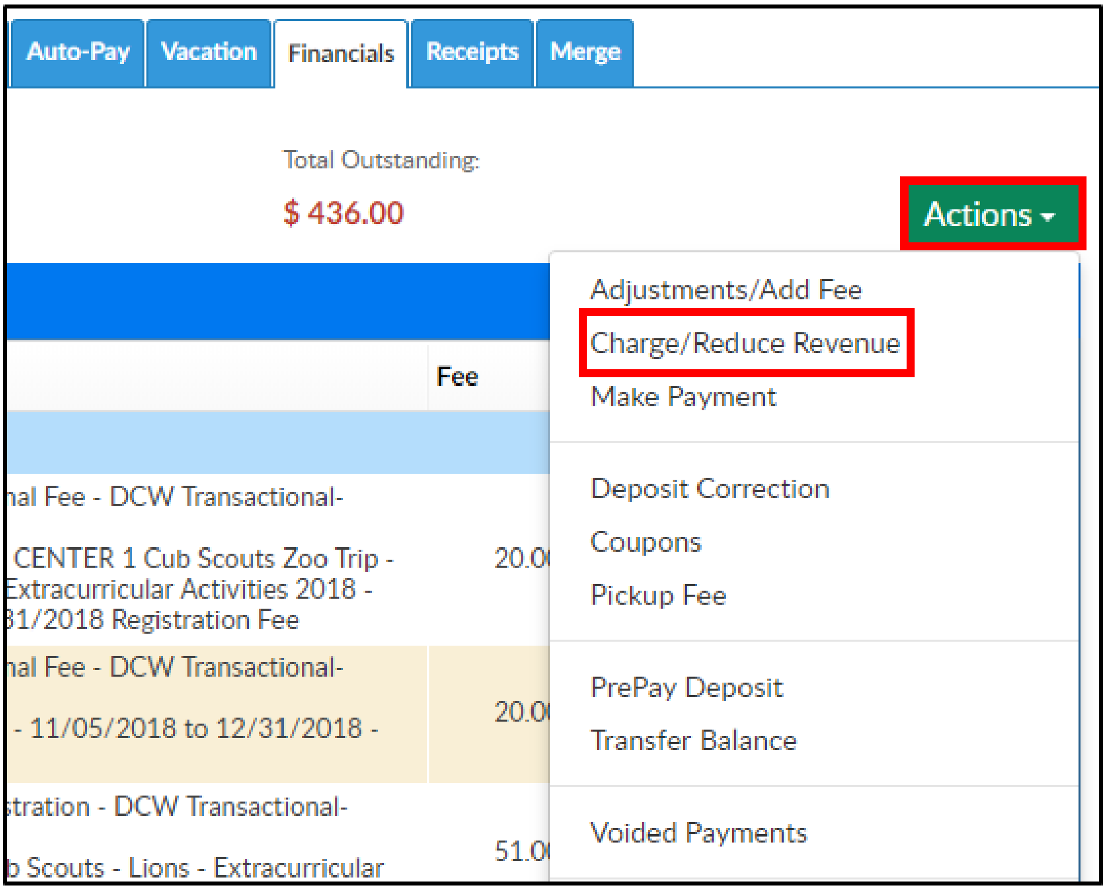
1. Search for the family by entering the last name into the Search box or using the magnifying glass



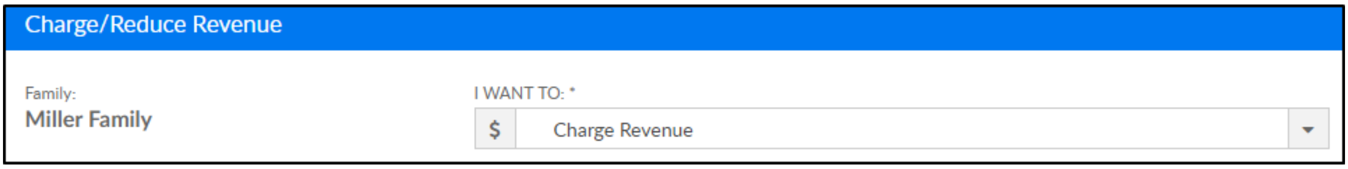
2. Select the Financials tab



3. The click Actions and select Charge/Reduce Revenue



4. Select Charge Revenue from the I WANT TO drop-down



Family:
Miller Family

I WANT TO: *
$ Charge Revenue

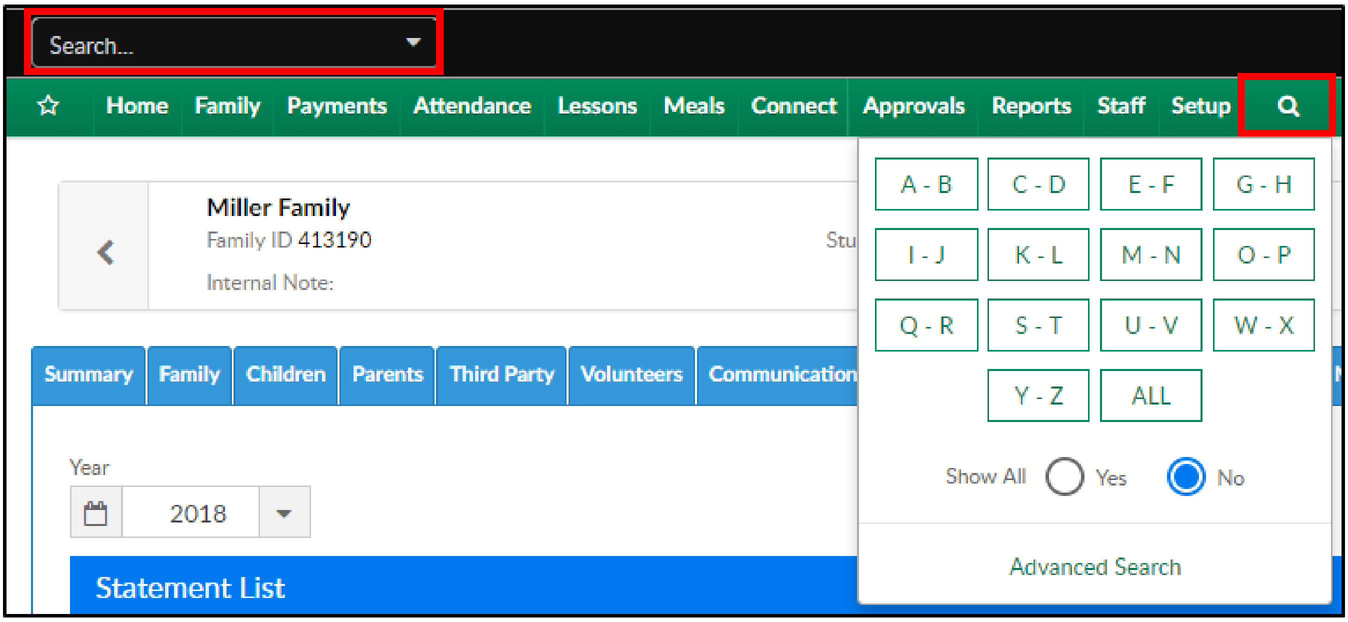
5. Adjustment Type - select the adjustment type from the drop-down menu
6. Adjustment Amount - enter the amount of revenue to be charged
7. Student/Child - select the student the revenue will be charged to
8. Post Date - select the post date
9. Post Against Classroom - select the classroom the revenue will be charged to
10. Notes - enter an additional notes
11. Period - From/To Date - select the period for the charged revenue
12. The Summary section will show the balance before and after the adjustment

Balance before Adjustment:	436.00
Adjustment:	100.00
Balance after Adjustment:	536.00

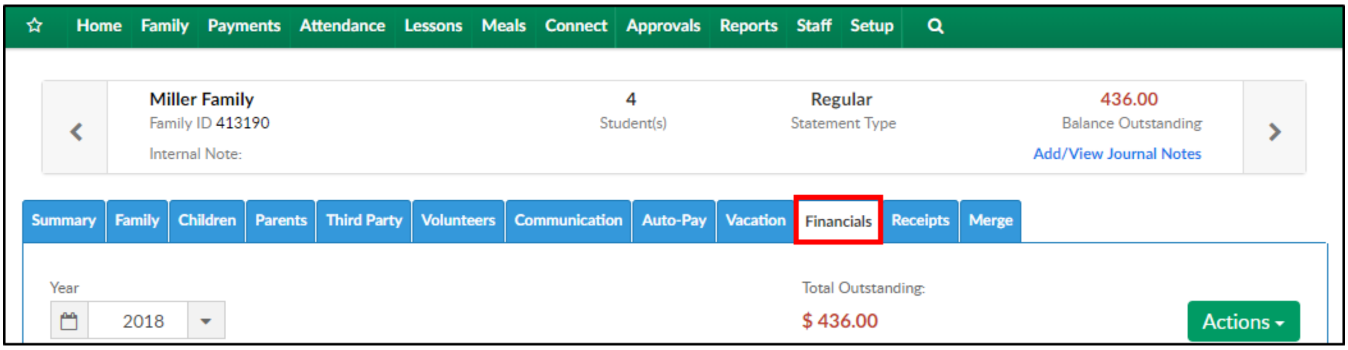
13. Click Save

Reduce Revenue

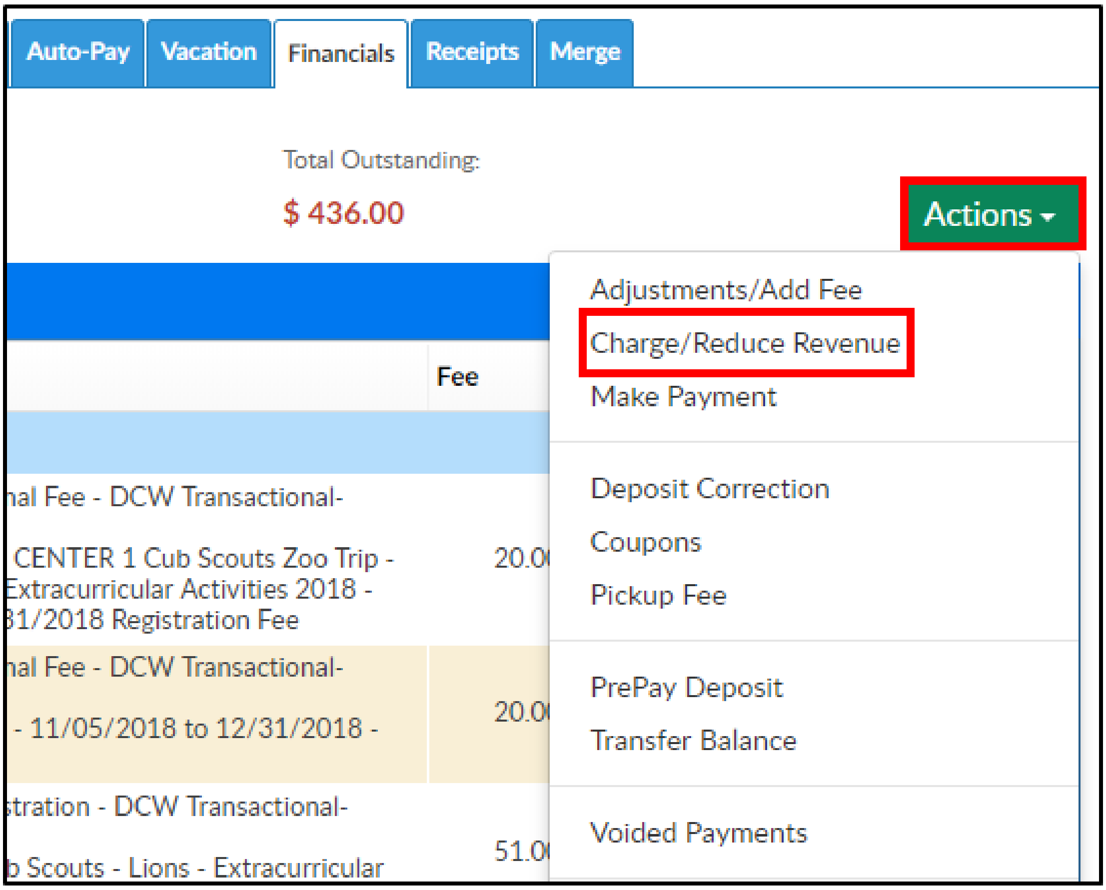
1. Search for the family by entering the last name into the Search box or using the magnifying glass



2. Select the Financials tab

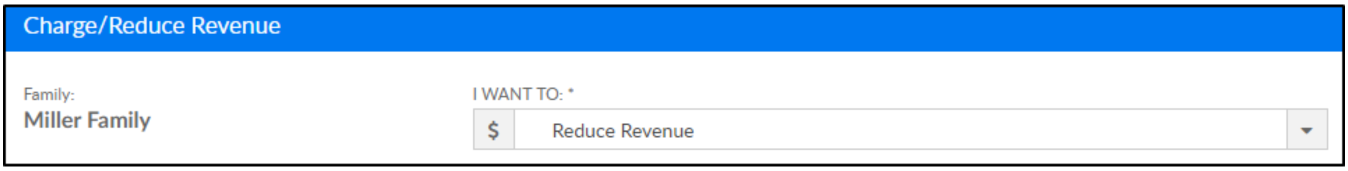


3. The click Actions and select Charge/Reduce Revenue



Total Outstanding:
$ 436.00

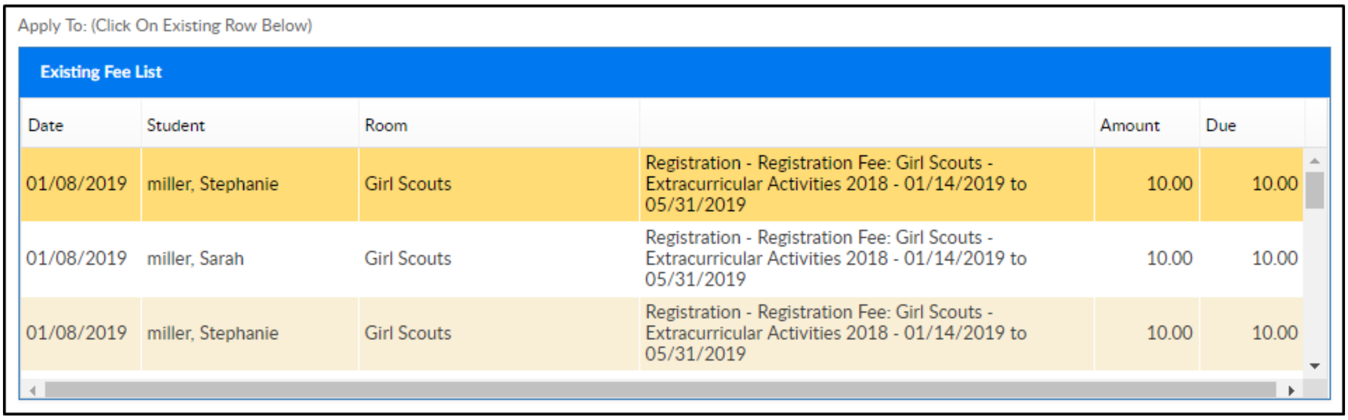
4. Select Reduce Revenue from the I WANT TO drop-down



Family: Miller Family

I WANT TO: * $ Reduce Revenue

5. In the Existing Fee List, select the row to associate the reduced revenue to



Date	Student	Room		Amount	Due
01/08/2019	miller, Stephanie	Girl Scouts	Registration - Registration Fee: Girl Scouts - Extracurricular Activities 2018 - 01/14/2019 to 05/31/2019	10.00	10.00
01/08/2019	miller, Sarah	Girl Scouts	Registration - Registration Fee: Girl Scouts - Extracurricular Activities 2018 - 01/14/2019 to 05/31/2019	10.00	10.00
01/08/2019	miller, Stephanie	Girl Scouts	Registration - Registration Fee: Girl Scouts - Extracurricular Activities 2018 - 01/14/2019 to 05/31/2019	10.00	10.00

6. Adjustment Amount - enter the amount of revenue to be reduced
7. Student/Child - the student's name, from the selected line above, will appear in this field
8. Post Date - select the post date
9. Notes - enter an additional notes
10. The Summary section will show the balance before and after the adjustment

Balance before Adjustment:	436.00
Adjustment:	20.00
Balance after Adjustment:	456.00

11. Click Save

Write-Off Family Bad Debt

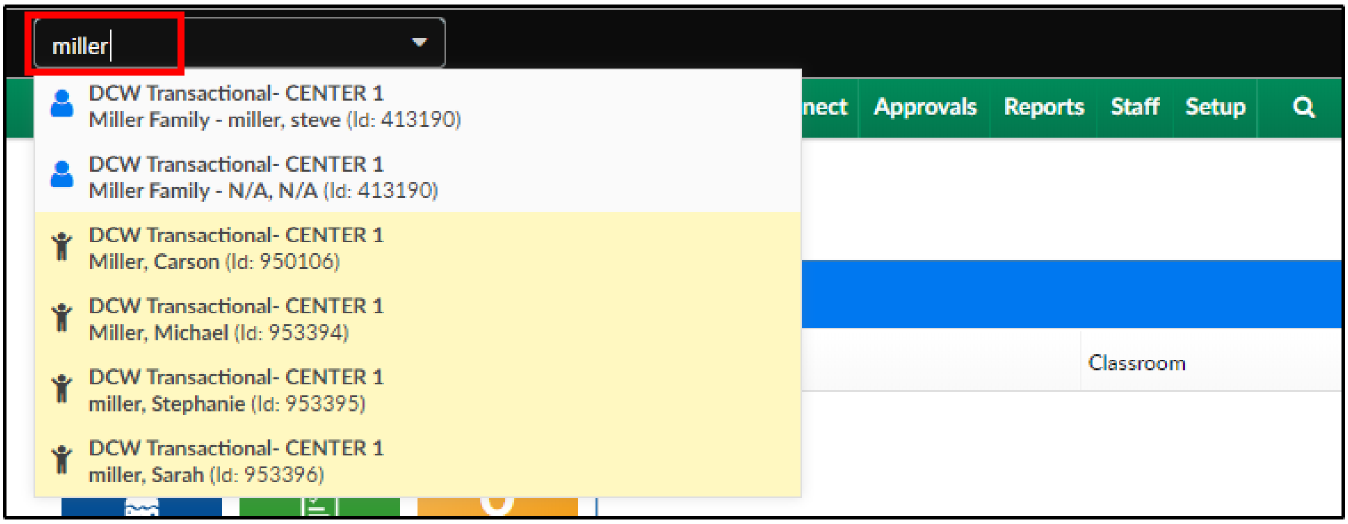
Click here for more information

Family Record, Financials Tab - Make Payment

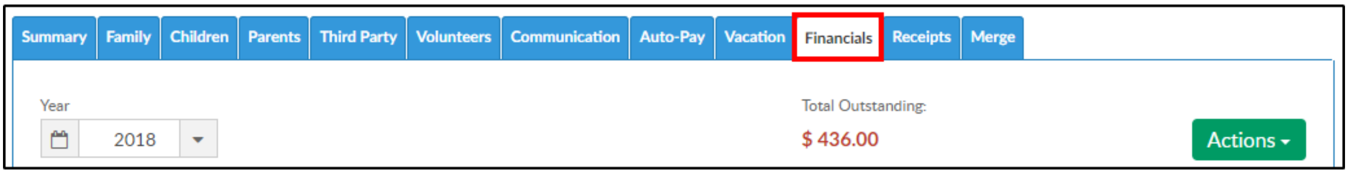
Last Modified on 01/11/2019 10:26 am EST

This screen only accepts paper-type payments; these include cash, check, and money order.

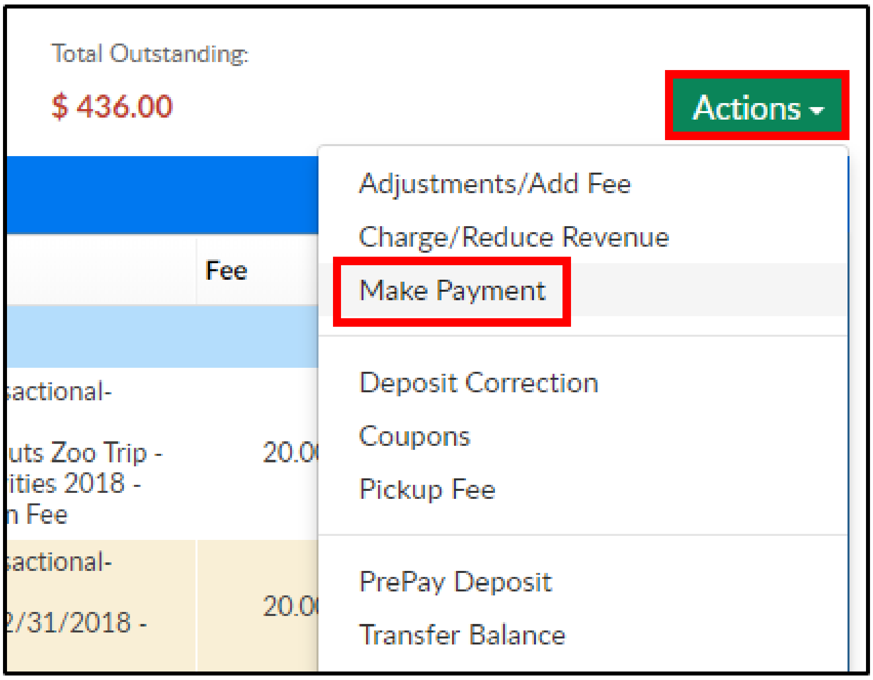
1. Navigate to the family's record



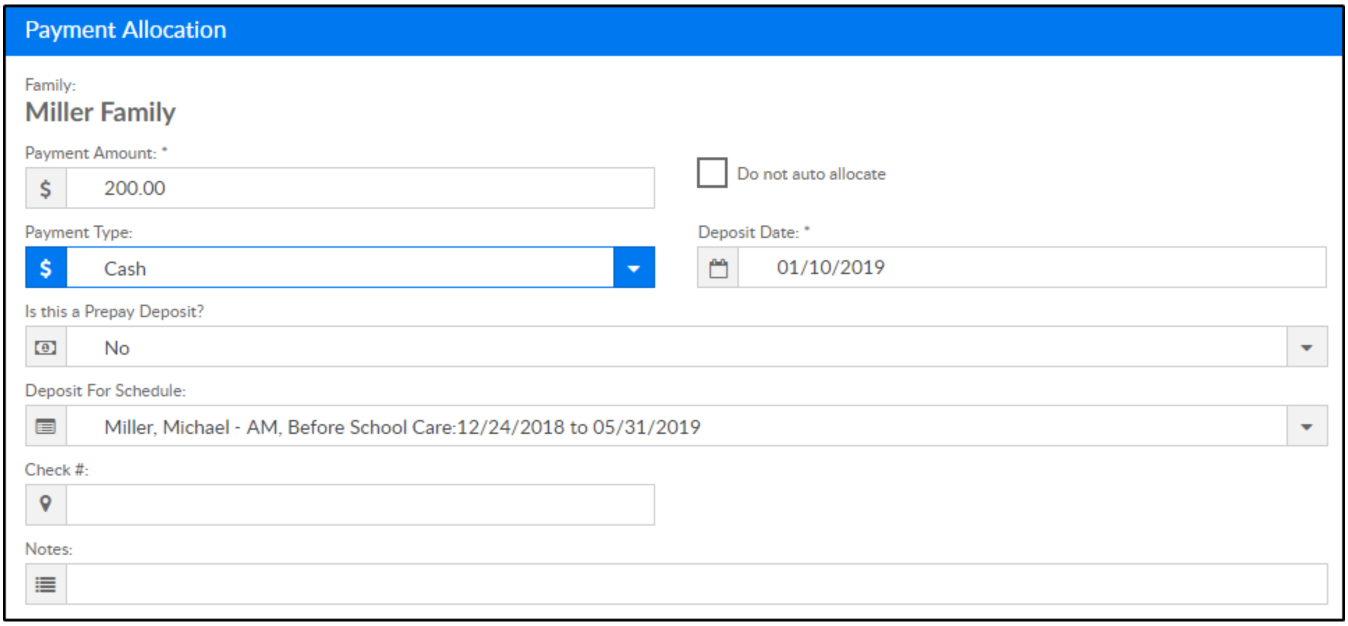
2. Click the Financial tab



3. Click Actions, then select Make Payment



4. Complete the Payment Allocation detail



Family:
Miller Family

Payment Amount: * $ 200.00

☐ Do not auto allocate

Payment Type: $ Cash

Deposit Date: * 01/10/2019

Is this a Prepay Deposit? No

Deposit For Schedule: Miller, Michael - AM, Before School Care:12/24/2018 to 05/31/2019

Check #:

Notes:

   - Payment Amount - enter the amount of the payment
   - Do not auto allocate - if the payment should to be associated to specific line item, select this option and choose the line item below in the Allocation Details section
   - Payment Type - choose the payment type
   - Deposit Date - enter the date the deposit was made for the payment
   - Is this a Prepay Deposit? - if this is payment for a prepaid deposit, select the type, if not, select No
   - Deposit for Schedule - choose the student and schedule from the drop-down list to associate the payment to
   - Check # - enter the check number for the payment, if applicable
   - Notes - enter any necessary notes

5. Click Save

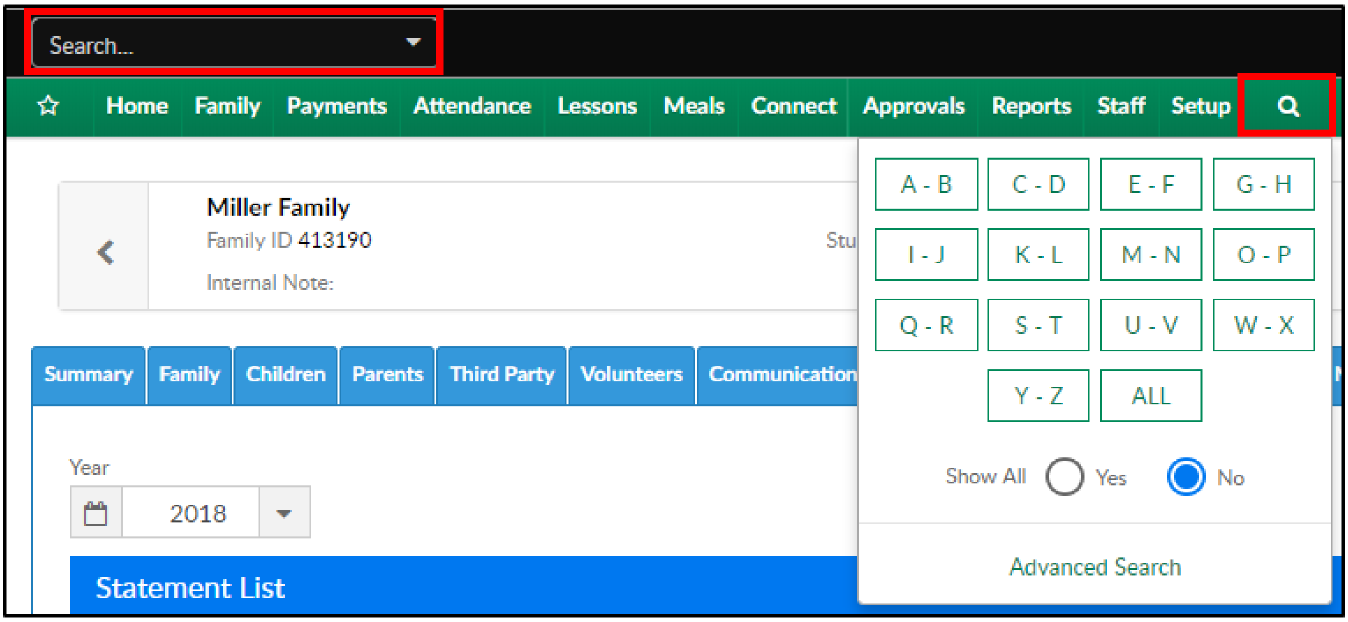
Family Record, Financials Tab - Coupons

Last Modified on 01/11/2019 11:08 am EST

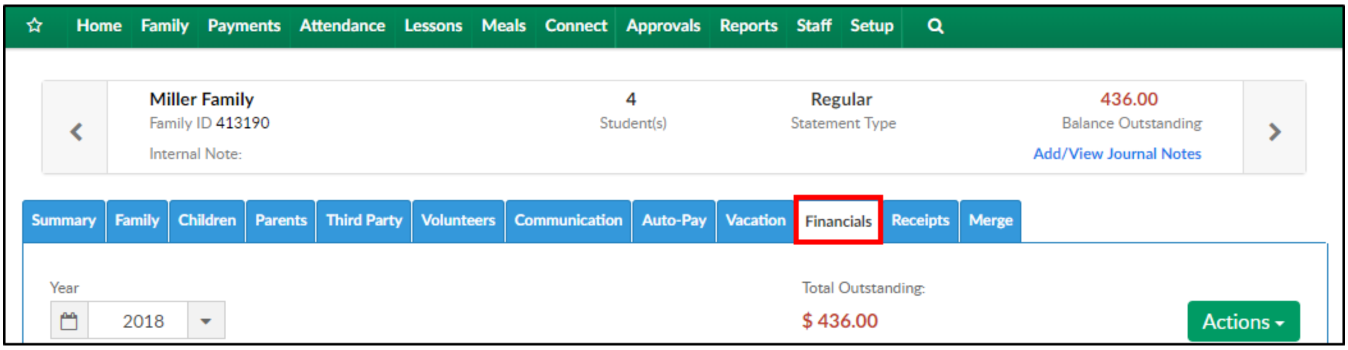
Coupons in the system allow administrators to advertise specific discounts as marketing or use coupons as a reward for families in the center. Before setting up coupons , Revenue Type Valid Values , Type - Fee Valid Values, and Rate Categories must be setup. Coupons can be applied as a one-time coupon or for multiple billing periods.

Adding a Coupon to a Student

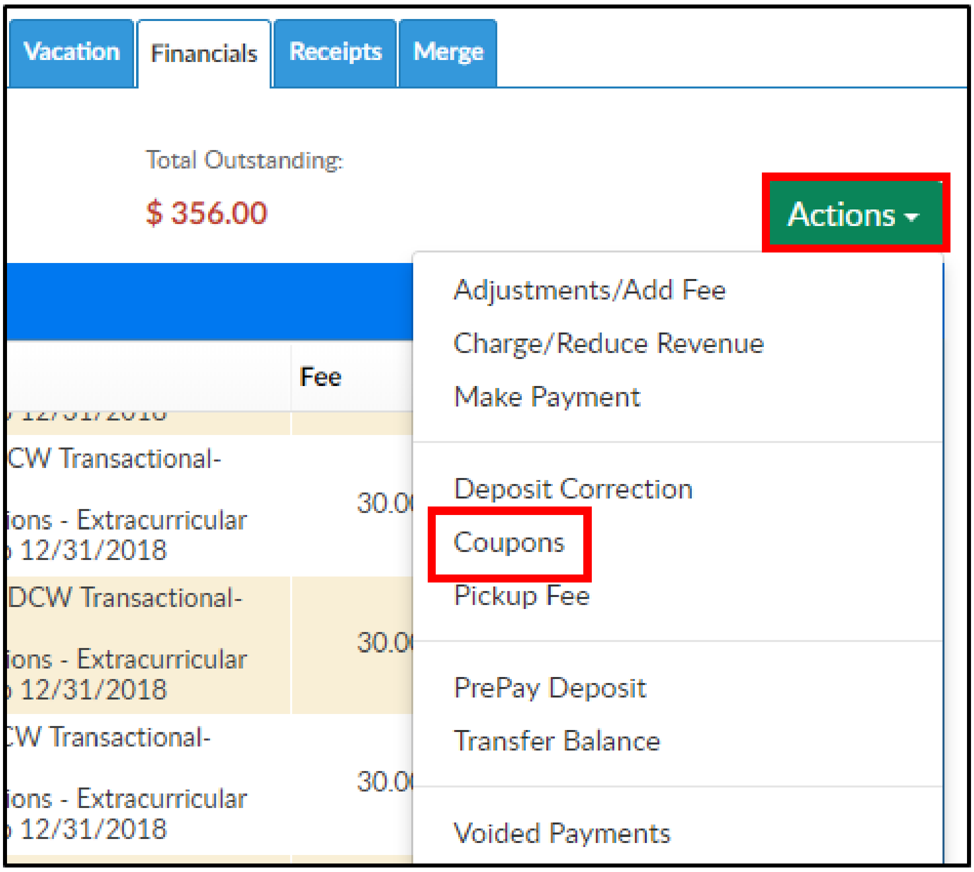
1. Search for the family by entering the last name into the Search box or using the magnifying glass



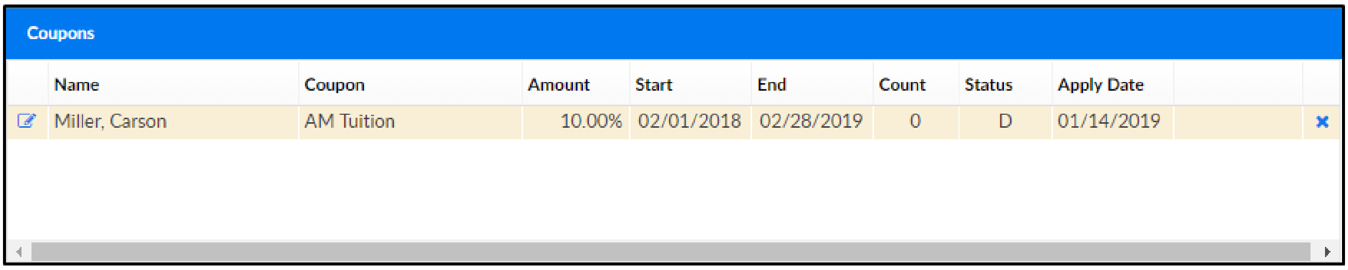
2. Select the Financials tab



3. The click Actions and select Coupons



4. The Coupons section will display current coupons being applied to the students within the selected family



Coupons

Name	Coupon	Amount	Start	End	Count	Status	Apply Date
Miller, Carson	AM Tuition	10.00%	02/01/2018	02/28/2019	0	D	01/14/2019

5. To add a new coupon, complete the Coupon Information section
    - Select Student - choose which student to apply the coupon to from the drop-down menu
    - Select Coupon - select a coupon from the available coupons. **Please Note**: coupons must be setup prior to this step. If a new coupon needs to be added, click here
    - Redemption Code - enter a redemption code, if applicable
    - Coupon Amount (Only for coupons that allow overrides) - when a coupon is selected, the section should auto-fill
    - Apply On Date - if there a date the coupon should be applied on, select the date from the calendar

    - Notes - enter any additional notes
6. Click Save

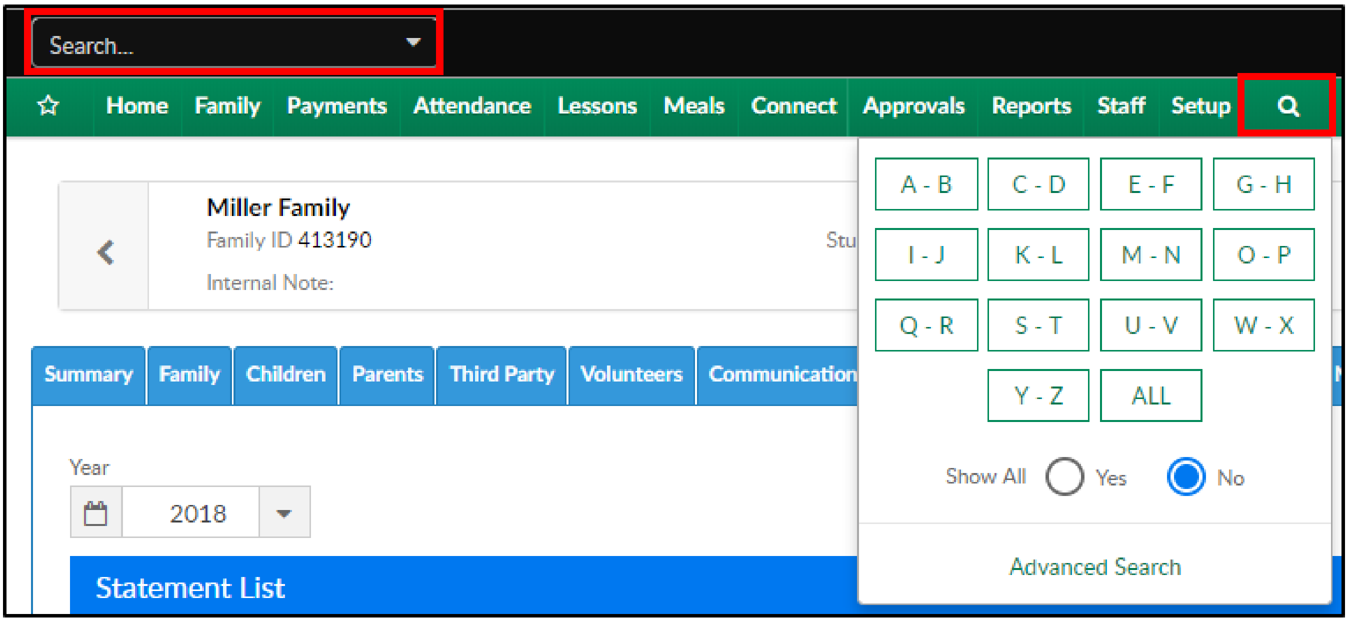
Family Record, Financials Tab - Pickup Fee

Last Modified on 01/11/2019 11:34 am EST

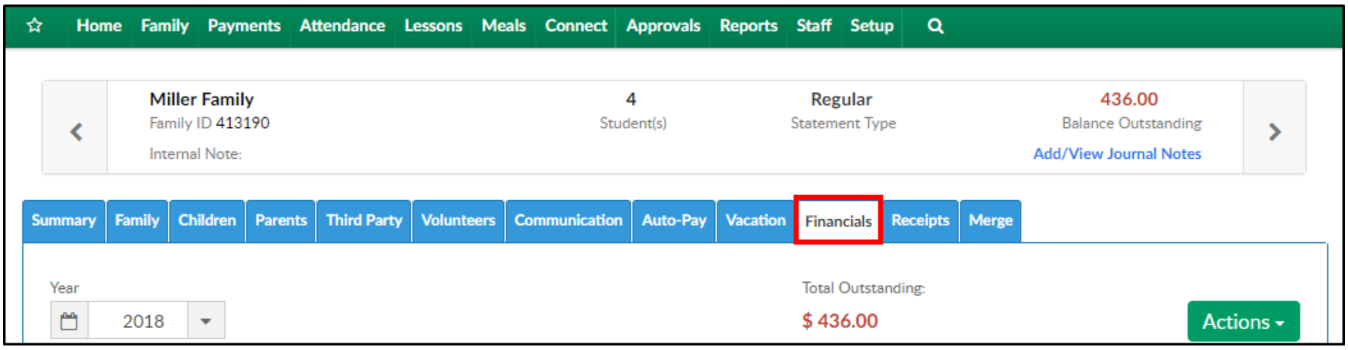
Late Pickup Fees allow a center to add rules to how a family should be charged if a student is picked up after center hours. Late Pickup Fees must be setup prior, click here for instructions.

Adding a Late Pickup Fee to a Student

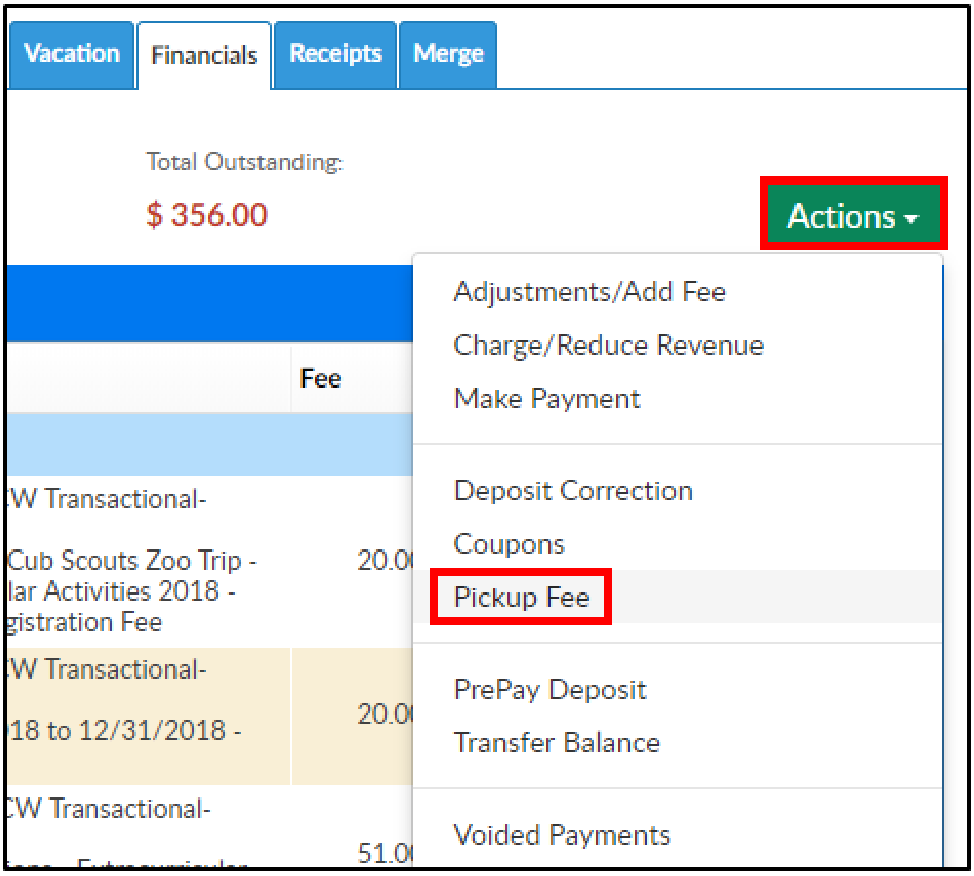
1. Search for the family by entering the last name into the Search box or using the magnifying glass



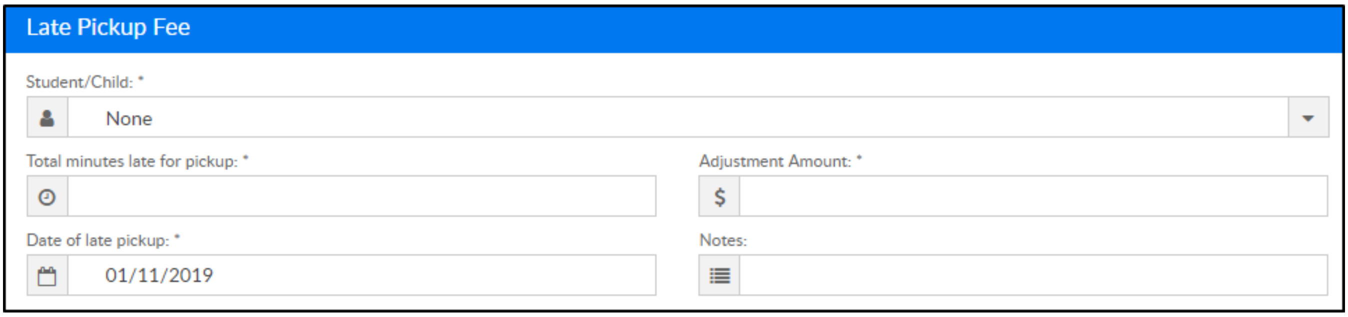
2. Select the Financials tab



3. The click Actions and select Pickup Fee



4. Complete the Late Pickup Fee section



Late Pickup Fee

Student/Child: * None

Total minutes late for pickup: *

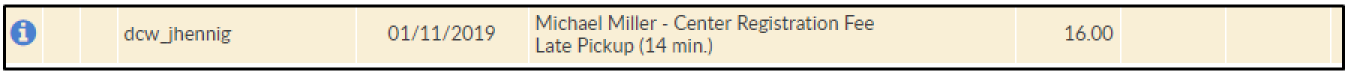
Adjustment Amount: * $

Date of late pickup: * 01/11/2019

Notes:

- Student/Child - select the student from the drop-down
- Total minutes late for pickup - enter the total number of minutes the student was picked up late
- Adjustment amount - this field should auto-fill based on the Late Pickup Fee setup
- Date of late pickup - select the date the student was picked up late
- Notes - enter any additional notes

5. Click Save. The fee will be added to the family's financial ledger



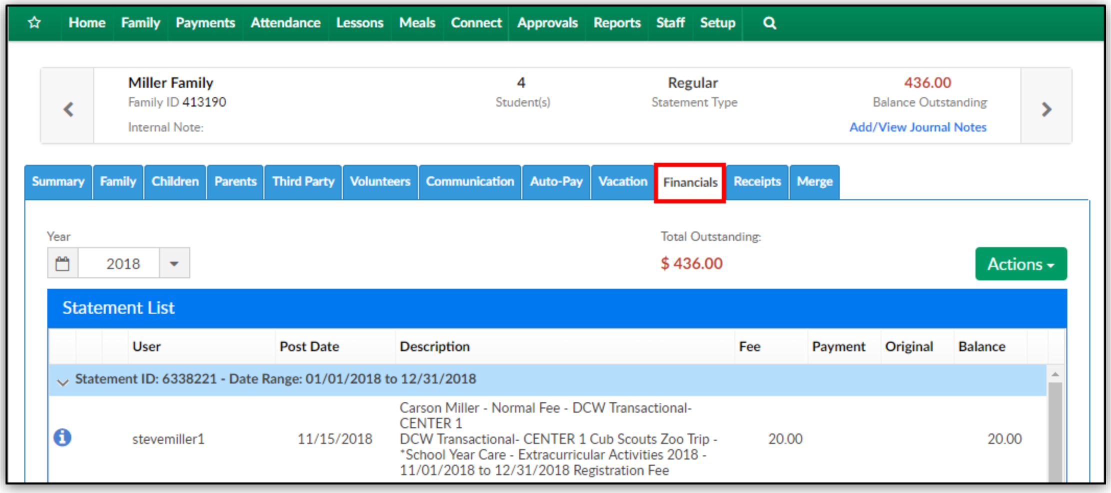
ℹ	dcw_jhennig	01/11/2019	Michael Miller - Center Registration Fee Late Pickup (14 min.)	16.00	

Family Record, Financials Tab - PrePay Deposit

Last Modified on 01/11/2019 3:54 pm EST

The PrePay Deposit option allows administrators to accept prepayments for families in the system. This is frequently used by businesses that accept prepayments, but do not want to have a large credit on a family's financial ledger.

1. Navigate to the family record, then select the Financials tab



Miller Family
Family ID 413190
Internal Note:

4
Student(s)

Regular
Statement Type

436.00
Balance Outstanding

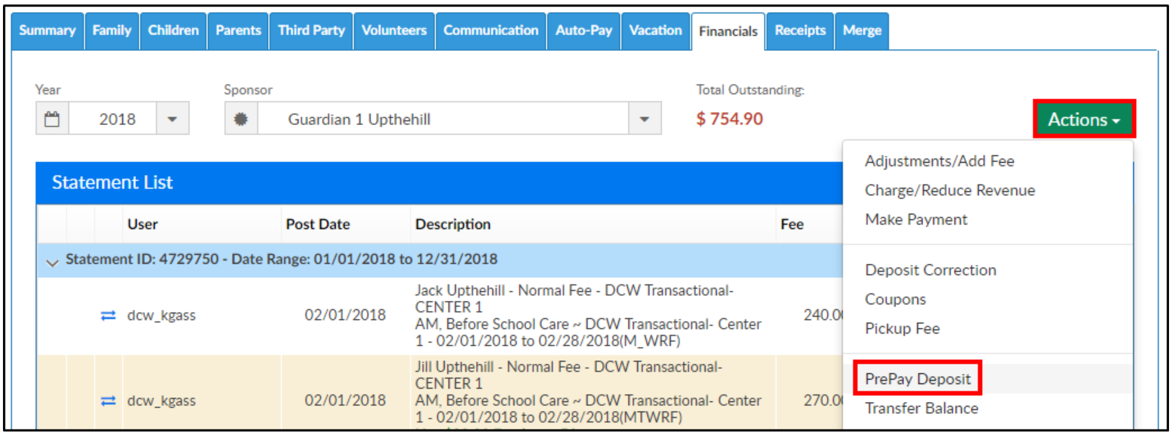
Year: 2018

Total Outstanding: $ 436.00

Statement List

User	Post Date	Description	Fee	Payment	Original	Balance
Statement ID: 6338221 - Date Range: 01/01/2018 to 12/31/2018						
stevemiller1	11/15/2018	Carson Miller - Normal Fee - DCW Transactional- CENTER 1 DCW Transactional- CENTER 1 Cub Scouts Zoo Trip - *School Year Care - Extracurricular Activities 2018 - 11/01/2018 to 12/31/2018 Registration Fee	20.00			20.00

2. Click Actions, then select PrePay Deposit



Year: 2018

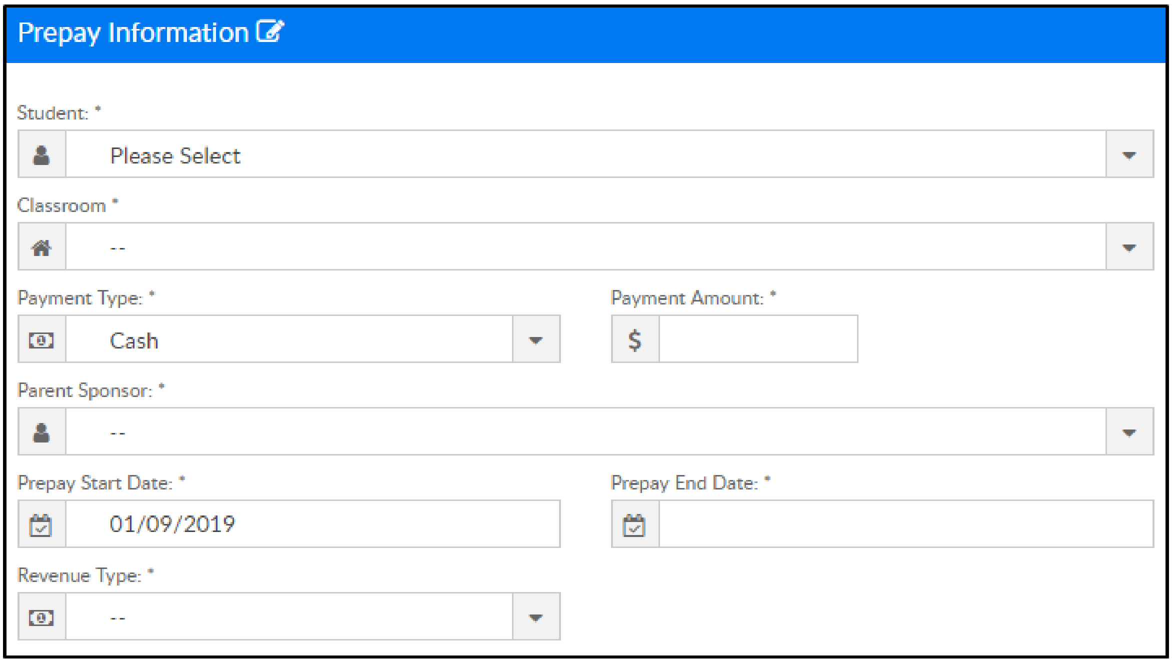
Sponsor: Guardian 1 Upthehill

Total Outstanding: $ 754.90

Statement List

User	Post Date	Description	Fee
Statement ID: 4729750 - Date Range: 01/01/2018 to 12/31/2018			
dcw_kgass	02/01/2018	Jack Upthehill - Normal Fee - DCW Transactional- CENTER 1 AM, Before School Care ~ DCW Transactional- Center 1 - 02/01/2018 to 02/28/2018(M_WRF)	240.0
dcw_kgass	02/01/2018	Jill Upthehill - Normal Fee - DCW Transactional- CENTER 1 AM, Before School Care ~ DCW Transactional- Center 1 - 02/01/2018 to 02/28/2018(MTWRF)	270.0

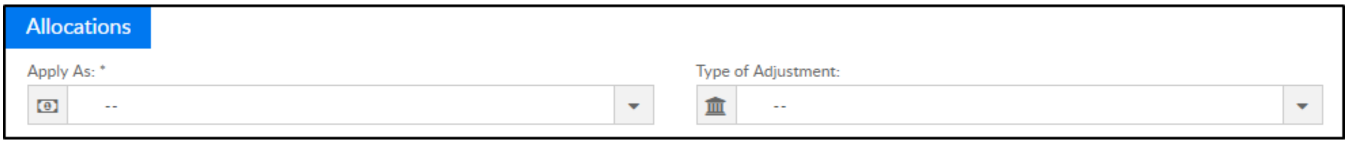
3. Navigate to the Prepay Information section and complete the information


Prepay Information

Student: *	Please Select
Classroom *	--
Payment Type: *	Cash
Payment Amount: *	$
Parent Sponsor: *	--
Prepay Start Date: *	01/09/2019
Prepay End Date: *	
Revenue Type: *	--

- Student - from the drop-down list, select the student that will have the prepayment allocated to them
- Classroom - choose the classroom the prepayment will be allocated against
- Room Semester - if there is a semester associated with the prepayment, choose the semester here
- Payment Type - select the method of payment
- Payment Amount - enter the amount for the payment
- Parent Sponsor - select the paying parent
- Prepay Start Date - enter the start date for the prepayment
- Prepay End Date - enter the end date for the prepayment
- Revenue Type - select the revenue type associated to the prepayment. **Please Note**: revenue types can be set up in Valid Values

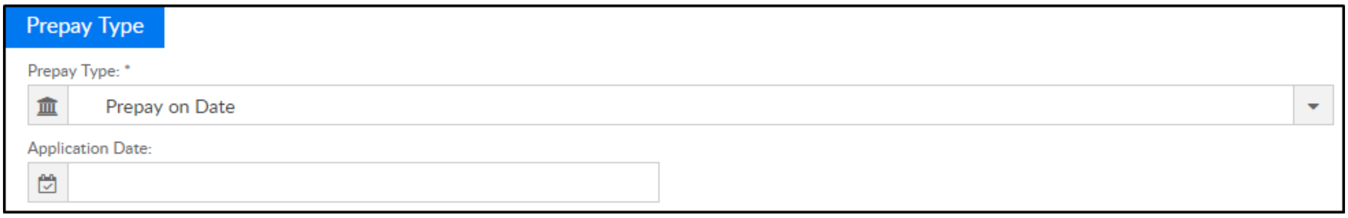
4. Complete the Allocations section


Allocations

Apply As: *	--
Type of Adjustment:	--

- Apply As
    - Payment - the prepayment will be posted on the family's financial ledger as a payment
    - Adjustment - the prepayment will be posted on the family's financial ledger as an adjustment
- Type of Payment - select the payment type the parent is using

5. Complete the Prepay Type section



Prepay Type

Prepay Type: * Prepay on Date

Application Date:

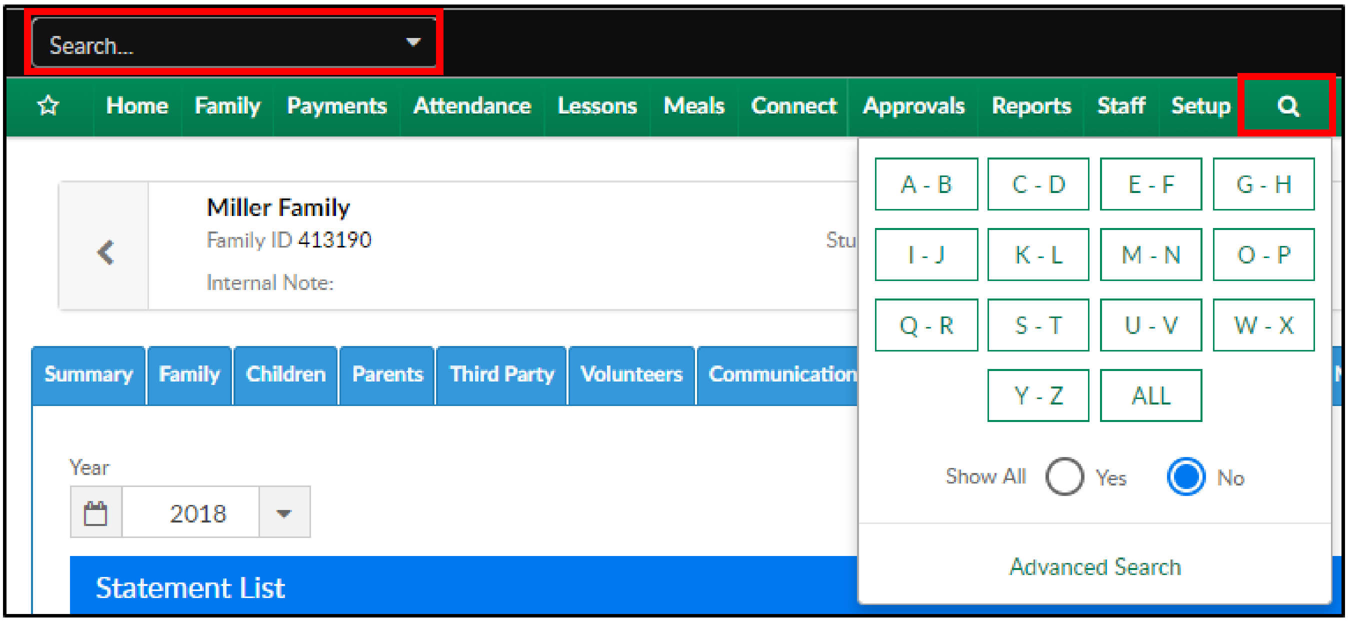
   - Prepay Type - this option will determine when the prepayment is posted to the family's financial ledger
      - Prepay on Billing Period - this will post the prepay on the family's account for each of the billing periods
         - Enter the Prepay Amount
         - Select the Prepay Amount Type (percentage or dollar)
      - Prepay on Date - the prepay will post on the family's account on the provided date
         - Provide the Application Date
      - Prepay on Child Withdrawal - the prepay will post to the family's account when a student withdraws from the center
6. Click Show More Fields to display the following options:
   - Check Number - if the parent is paying by check, enter the check number into this field
   - Deposit Discount Type - if there is a discount setup for prepaid deposits, select the discount from the drop-down
   - Notes - enter any necessary notes regarding the prepayment
   - DCW Batch Number - this option is used when payments are being batched with user defined batch numbers, typically for reconciliation purposes. See Batch & Report for more information
   - Assigned Batch Number - this option is used when payments are being batched with system defined batch numbers, typically for reconciliation purposes. See Batch & Report for more information

Family Record, Financials Tab - Transfer Balance

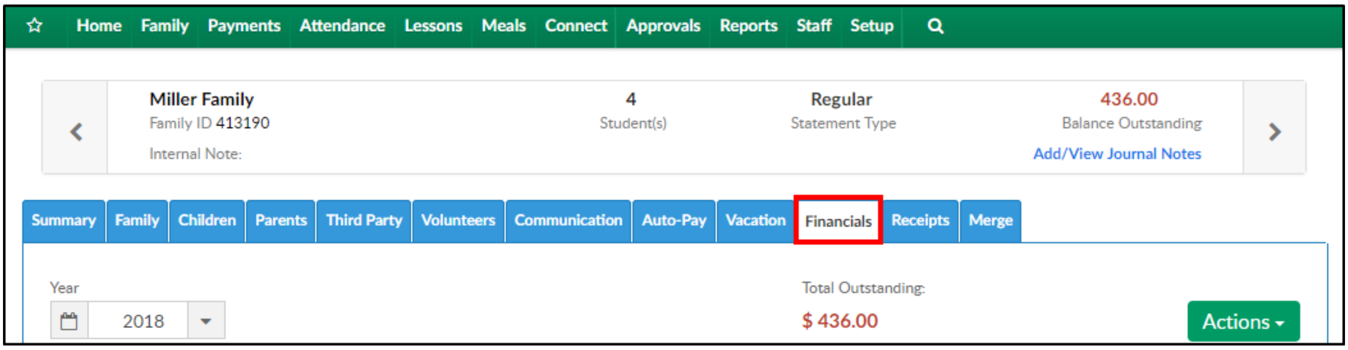
Last Modified on 01/11/2019 12:19 pm EST

The Transfer Balance feature allows administrators to transfer an entire balance or partial balance to another family.

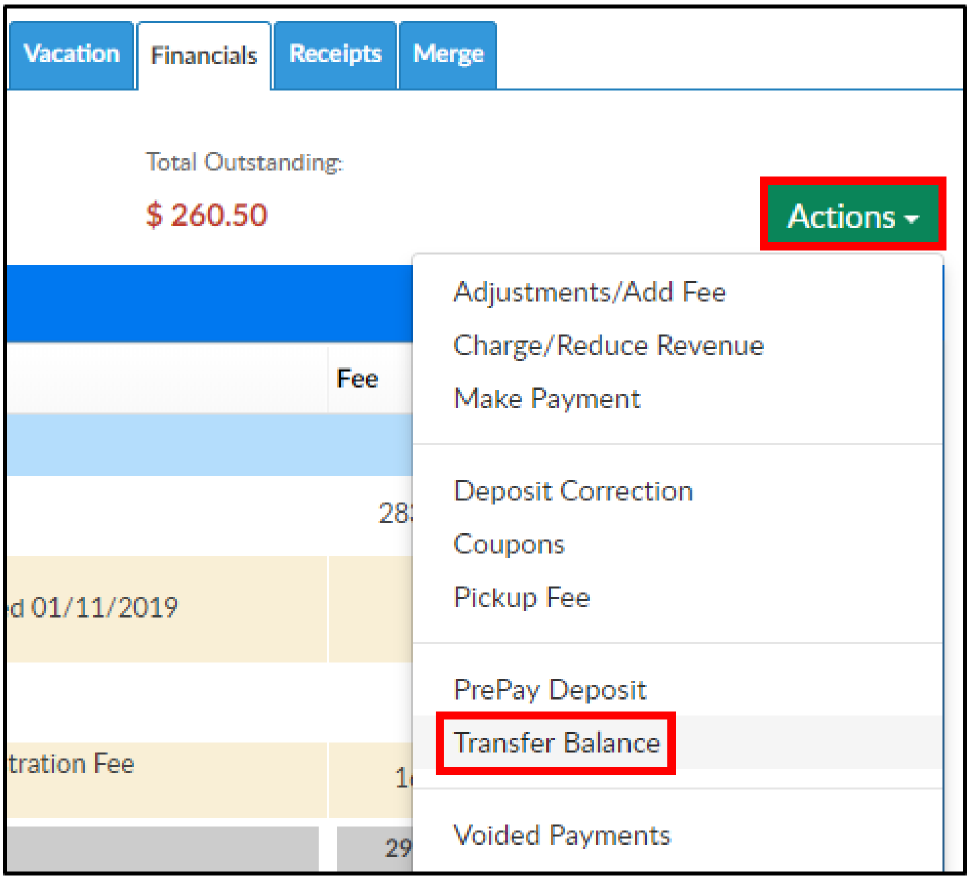
1. Search for the family to transfer the balance from by entering the last name into the Search box or using the magnifying glass



2. Select the Financials tab

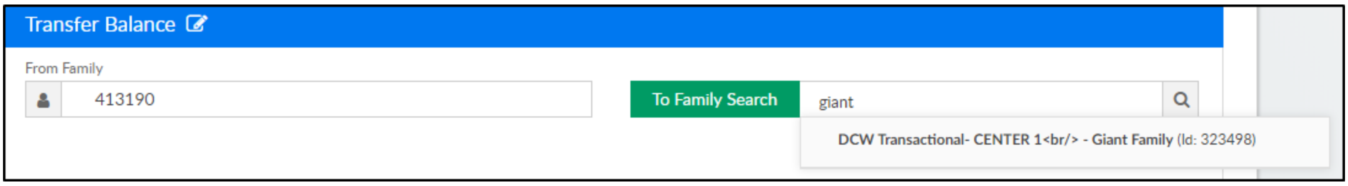


3. The click Actions and select Transfer Balance



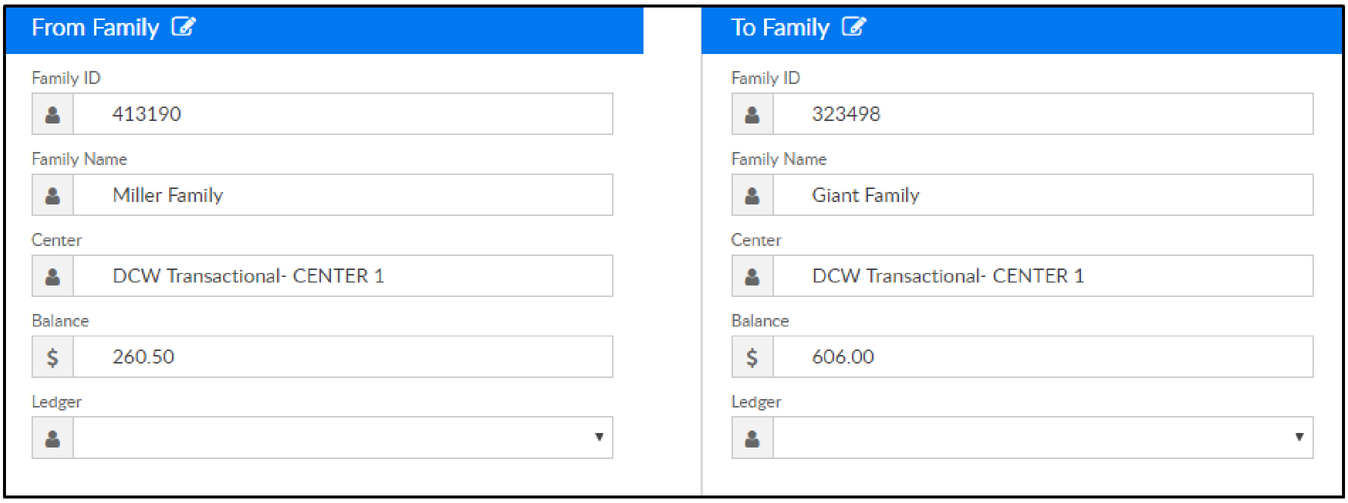
Total Outstanding:
$ 260.50

4. In the Transfer Balance section, the From Family's information will be filled in. Search the To Family's information using the family name or family ID



From Family: 413190
To Family Search: giant
DCW Transactional- CENTER 1
 - Giant Family (Id: 323498)

5. Once the To Family is selected, the fields below will be completed automatically



From Family

Family ID: 413190
Family Name: Miller Family
Center: DCW Transactional- CENTER 1
Balance: $ 260.50
Ledger:

To Family

Family ID: 323498
Family Name: Giant Family
Center: DCW Transactional- CENTER 1
Balance: $ 606.00
Ledger:

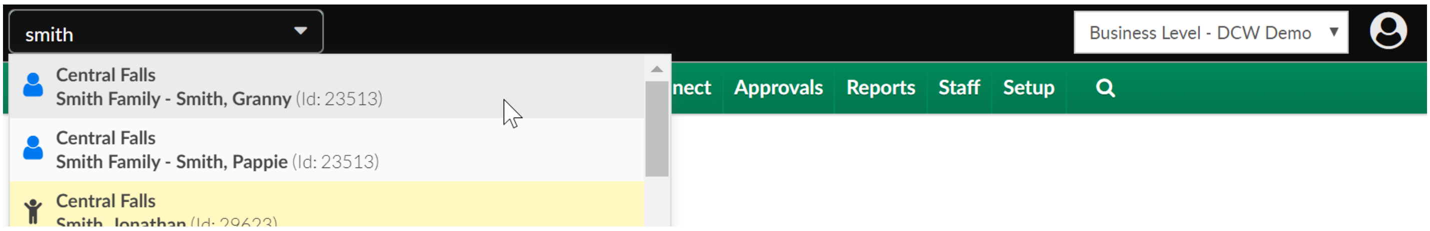
6. Amount to Transfer - enter the amount of the balance to transfer to the new family
7. Notes - enter any additional notes

8. Click Save

How to take a credit card or ACH payment?

Last Modified on 05/01/2018 12:21 pm EDT

Go to the family's financial record.



Central Falls
Smith Family - Smith, Granny (Id: 23513)

Central Falls
Smith Family - Smith, Pappie (Id: 23513)

Central Falls
Smith, Jonathan (Id: 29623)

On the financial page, select the actions button- then select Online Credit Card-

Smith Family
Family ID 23513
Internal Note: Test for Internal Notes

3 Student(s)

Regular Statement Type

24482.00 Balance Outstanding

Year: 2017

Total Outstanding: $ 24,482.00

Normal Statement List

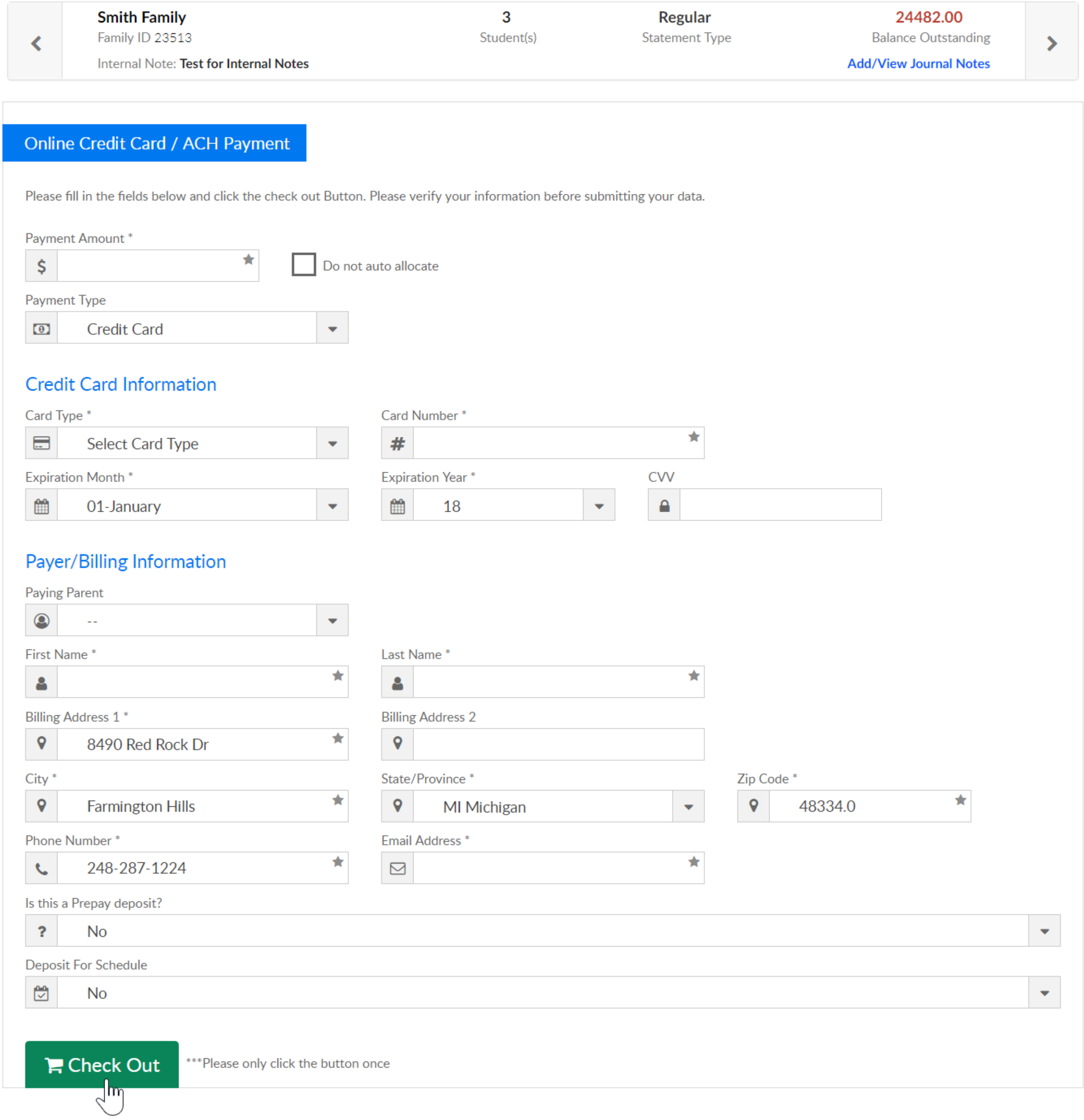
User	Post Date	Description
Statement ID: 3499375 - Date Range: 05/21/2017 to 05/27/2017		
	07/20/2017	Normal Fee Previous Balance Owed - 04/02/2017 - 04/08/2017
System	05/21/2017	Janes Smith - Normal Fee - Central Falls A Big Room - 05/21/2017 to 05/27/2017

On the payment screen, enter the payment amount then select the payment type.

From this screen only Credit Card and ACH payments can be made.

Enter credit card or ACH detail in the credit card information section. Then select the payer and related detail.

Once the payment detail has been entered, select Check Out to process the payment. ONLY CLICK THIS BUTTON ONCE.



Smith Family
Family ID 23513
Internal Note: **Test for Internal Notes**

3
Student(s)

Regular
Statement Type

24482.00
Balance Outstanding

Add/View Journal Notes

Online Credit Card / ACH Payment

Please fill in the fields below and click the check out Button. Please verify your information before submitting your data.

Payment Amount *: $
☐ Do not auto allocate

Payment Type: Credit Card

Credit Card Information

Card Type *: Select Card Type

Card Number *:

Expiration Month *: 01-January

Expiration Year *: 18

CVV:

Payer/Billing Information

Paying Parent: --

First Name *:

Last Name *:

Billing Address 1 *: 8490 Red Rock Dr

Billing Address 2:

City *: Farmington Hills

State/Province *: MI Michigan

Zip Code *: 48334.0

Phone Number *: 248-287-1224

Email Address *:

Is this a Prepay deposit?: No

Deposit For Schedule: No

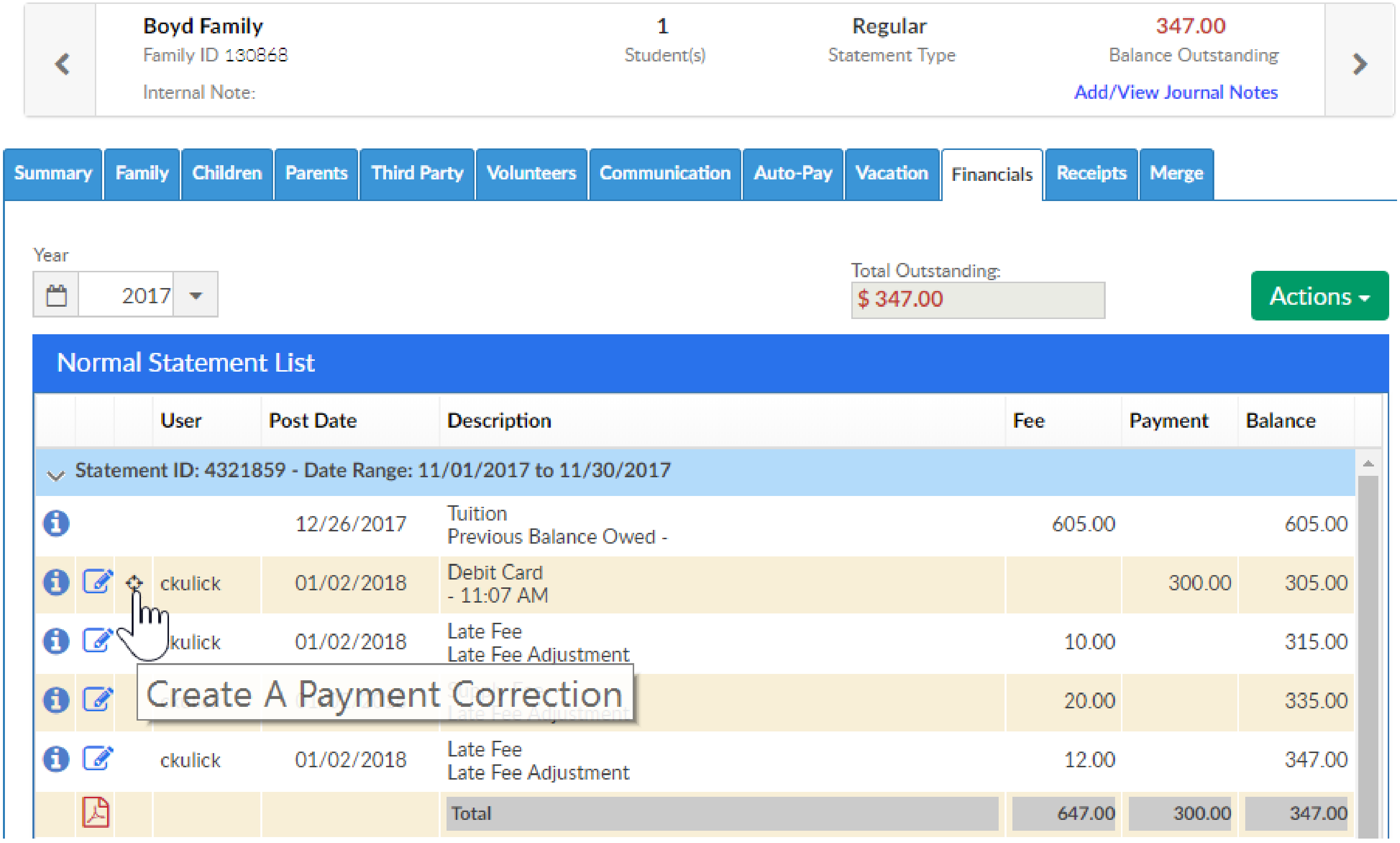
***Please only click the button once

The payment will be processed through the gateway and will immediately display on the family's financial ledger.

Processing a refund

Last Modified on 05/01/2018 12:18 pm EDT

To process a refund go to the family's financial page and select the payment corrections icon.



Boyd Family
Family ID 130868
Internal Note:

1
Student(s)

Regular
Statement Type

347.00
Balance Outstanding
Add/View Journal Notes

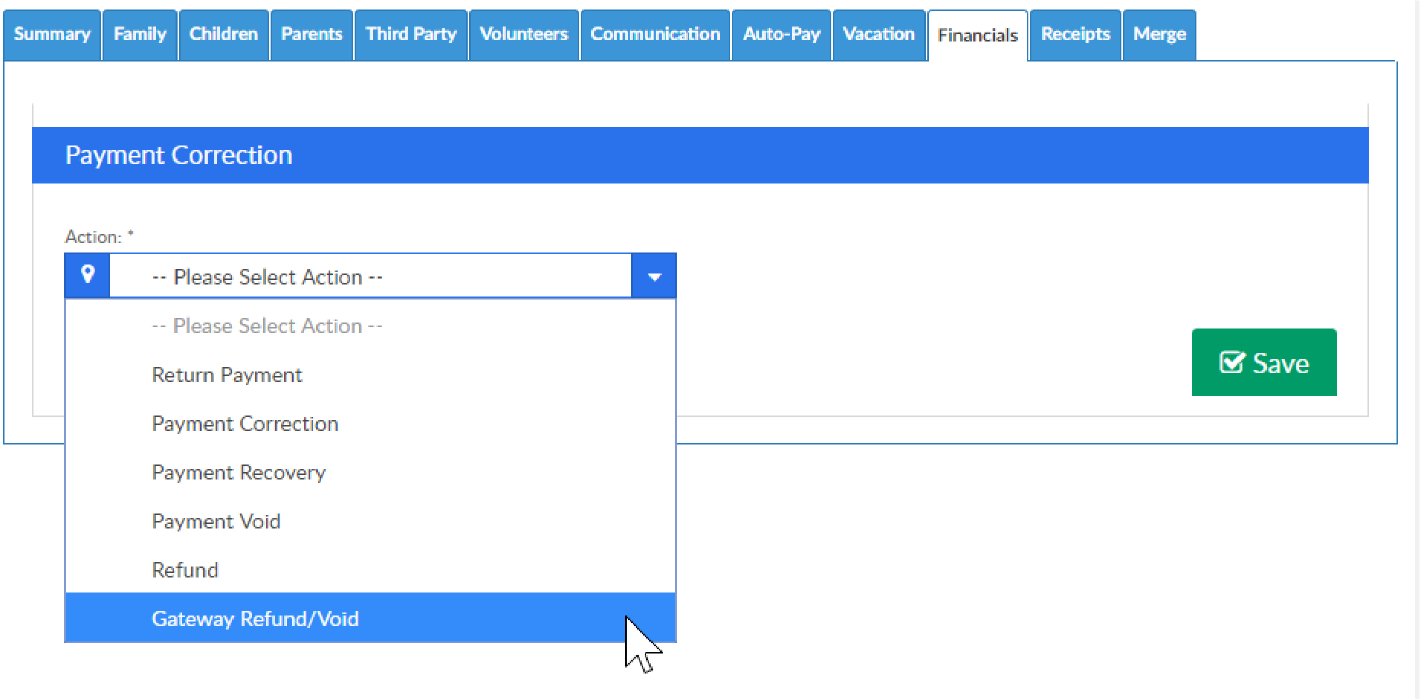
Year: 2017

Total Outstanding: $ 347.00

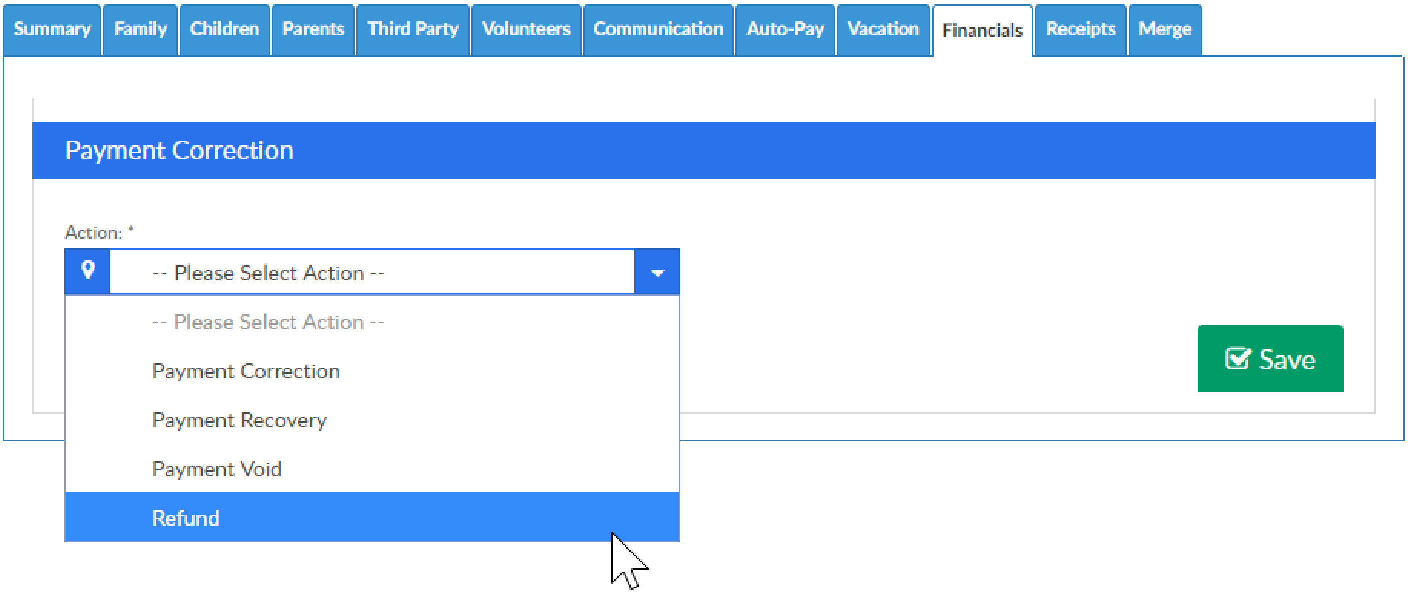
Normal Statement List

User	Post Date	Description	Fee	Payment	Balance
Statement ID: 4321859 - Date Range: 11/01/2017 to 11/30/2017					
	12/26/2017	Tuition Previous Balance Owed -	605.00		605.00
ckulick	01/02/2018	Debit Card - 11:07 AM		300.00	305.00
ckulick	01/02/2018	Late Fee Late Fee Adjustment	10.00		315.00
		Late Fee Adjustment	20.00		335.00
ckulick	01/02/2018	Late Fee Late Fee Adjustment	12.00		347.00
		Total	647.00	300.00	347.00

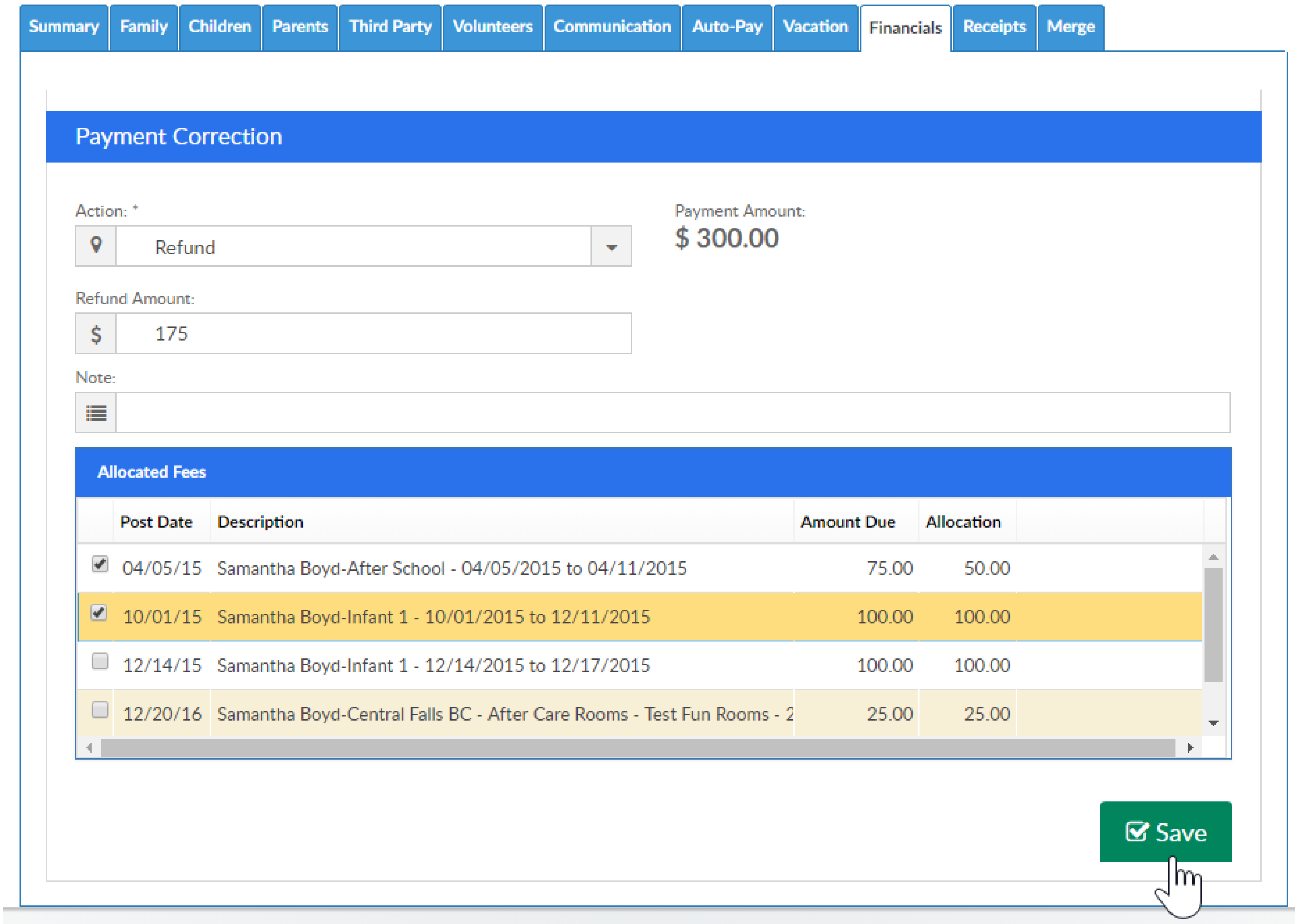
If the refund is a credit card refund select Gateway Refund/Void-



If the refund is a check or cash refund select Refund-



Enter amount being refunded, then select Save-



Action: * Refund

Payment Amount: $ 300.00

Refund Amount: $ 175

Note:

Allocated Fees

	Post Date	Description	Amount Due	Allocation
☑	04/05/15	Samantha Boyd-After School - 04/05/2015 to 04/11/2015	75.00	50.00
☑	10/01/15	Samantha Boyd-Infant 1 - 10/01/2015 to 12/11/2015	100.00	100.00
☐	12/14/15	Samantha Boyd-Infant 1 - 12/14/2015 to 12/17/2015	100.00	100.00
☐	12/20/16	Samantha Boyd-Central Falls BC - After Care Rooms - Test Fun Rooms - 2	25.00	25.00

- If the payment was made by cash or check, the refund will need to be created outside of our system after the Refund option has been selected and added to the financial ledger.

- If the payment was made electronically- credit card or ACH and the Gateway Refund/Void option is selected the refund will automatically go back to the parent's credit card or ACH account.

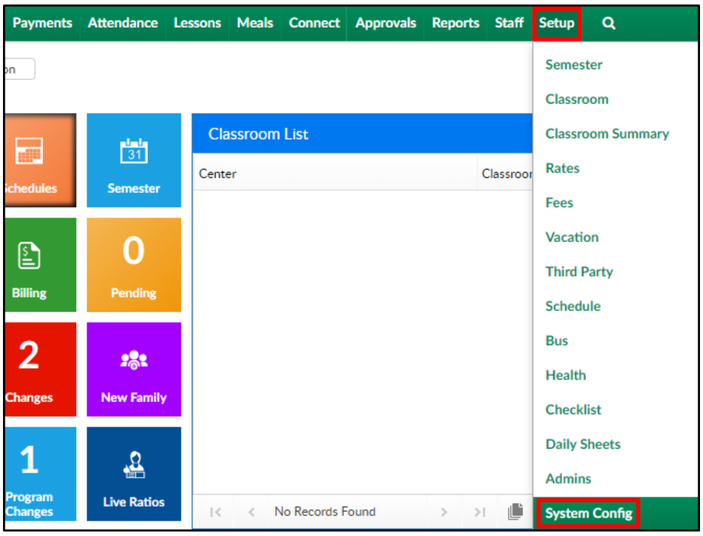
Family Record, Receipts Tab

Last Modified on 01/08/2019 3:49 pm EST

The Receipts tab within the Family record contains email receipts that were sent to parents after they register their existing student(s) into a program.

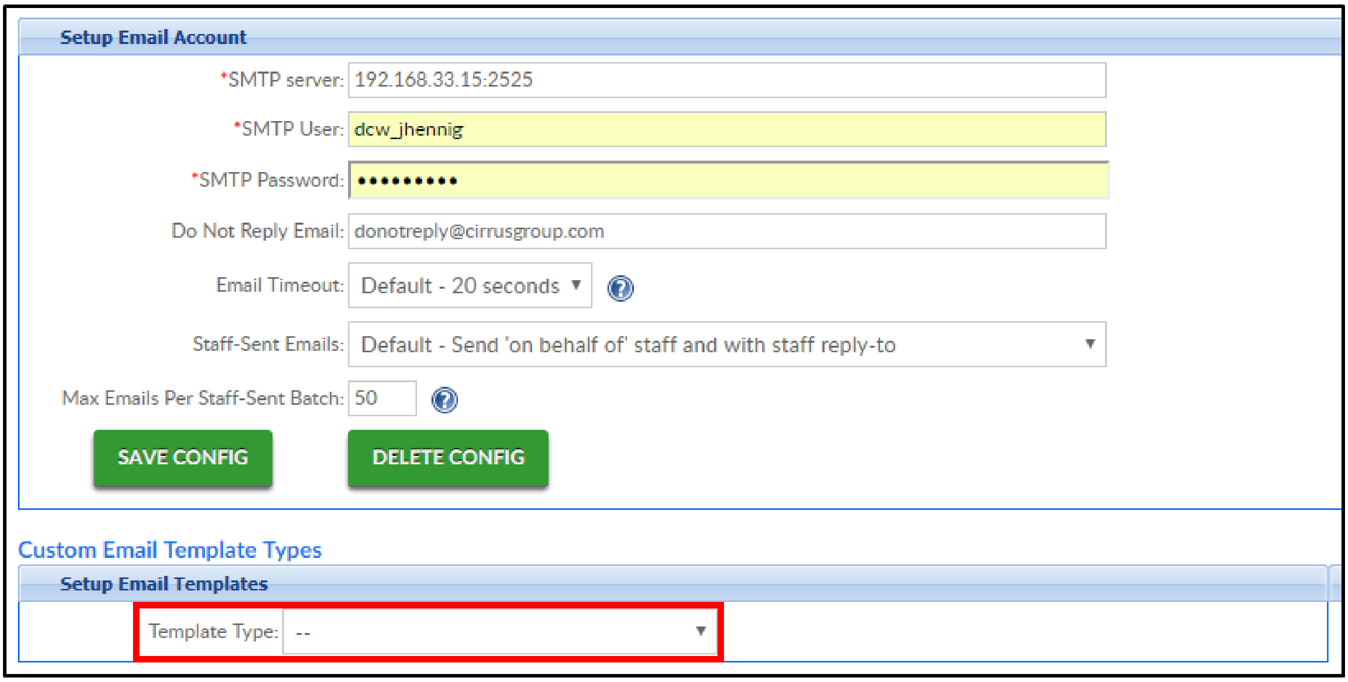
Setting up the Email Template

1. Click Setup, then select System Config



2. Select Email

3. Navigate to the Template Type drop-down



Setup Email Account

*SMTP server: 192.168.33.15:2525

*SMTP User: dcw_jhennig

*SMTP Password: ●●●●●●●●●

Do Not Reply Email: donotreply@cirrusgroup.com

Email Timeout: Default - 20 seconds

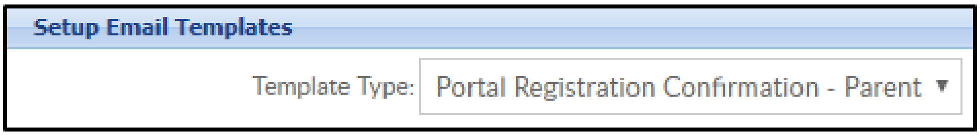
Staff-Sent Emails: Default - Send 'on behalf of' staff and with staff reply-to

Max Emails Per Staff-Sent Batch: 50

Setup Email Templates

Template Type: --

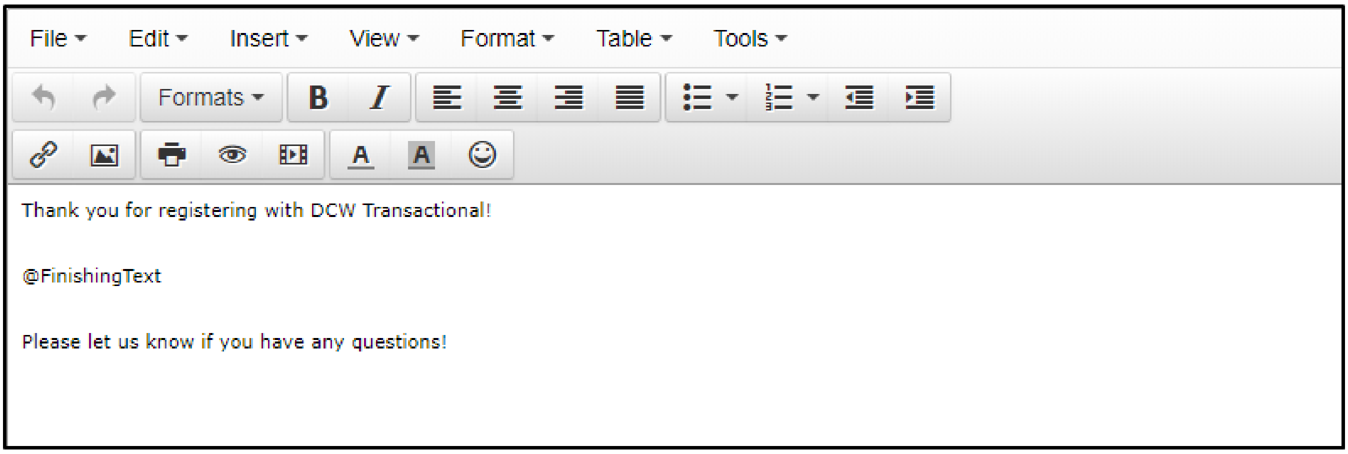
4. Select the Template Type: Portal Registration Confirmation - Parent



Setup Email Templates

Template Type: Portal Registration Confirmation - Parent

5. Choose a message format
    - PLAIN
    - HTML (recommended)
6. Apply To: (This option is only available when setting up the template under the business level)
    - Current Center Only - the template will be created for the current center
    - All Centers - the template will be created for all centers under the business level
7. Enter a Subject for the email
8. Enter the email message



Thank you for registering with DCW Transactional!

@FinishingText

Please let us know if you have any questions!

9. Click Save
10. This message will appear in the Receipts tab of returning families after registration

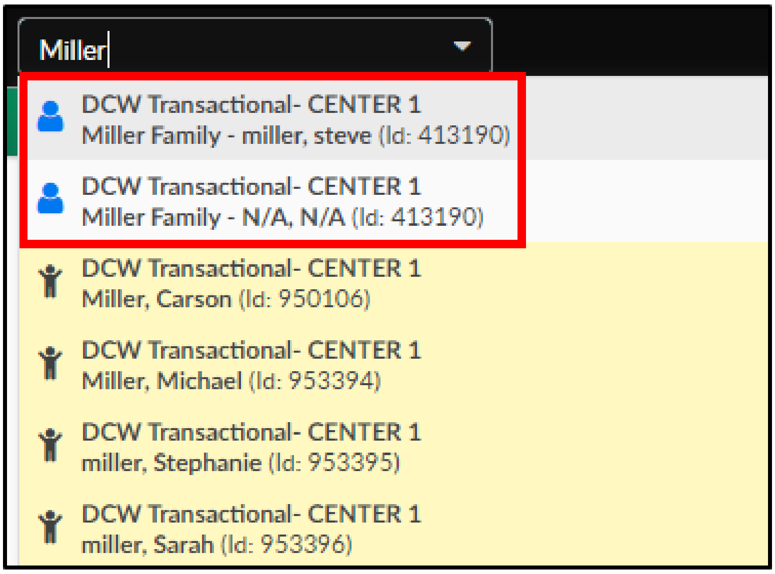
Please Note: Program specific Finishing Text can be setup in the room configuration screen .

Viewing Receipts

To view the email receipts sent to parents, follow the steps below:

1. Search by the student's last name in the top search field

2. Click on of the parent/guardian's name



Miller

DCW Transactional- CENTER 1
Miller Family - miller, steve (Id: 413190)

DCW Transactional- CENTER 1
Miller Family - N/A, N/A (Id: 413190)

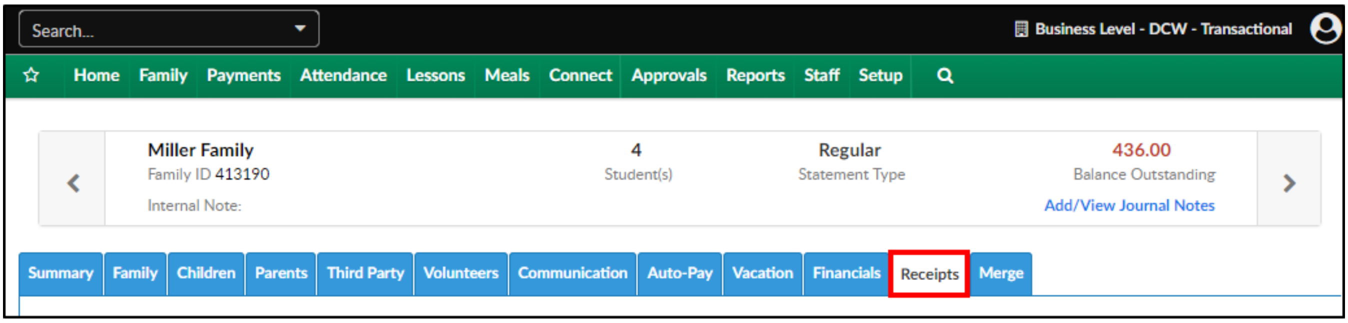
DCW Transactional- CENTER 1
Miller, Carson (Id: 950106)

DCW Transactional- CENTER 1
Miller, Michael (Id: 953394)

DCW Transactional- CENTER 1
miller, Stephanie (Id: 953395)

DCW Transactional- CENTER 1
miller, Sarah (Id: 953396)

3. Click the Receipts tab



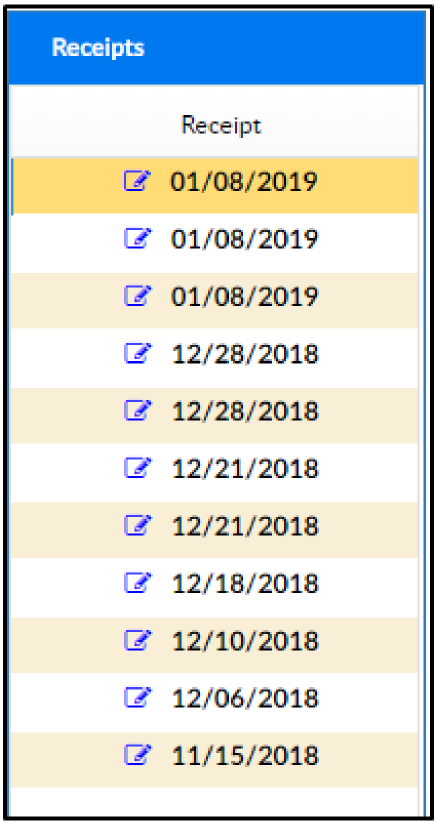
Miller Family
Family ID 413190
Internal Note:

4
Student(s)

Regular
Statement Type

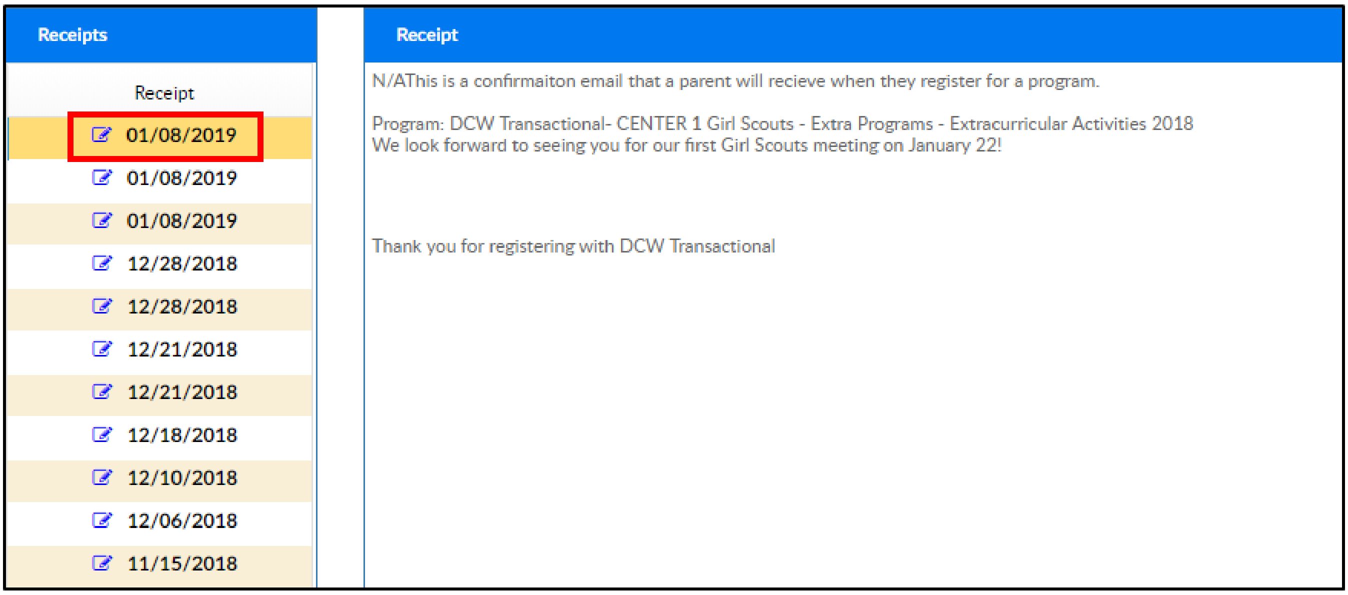
436.00
Balance Outstanding
Add/View Journal Notes

4. Locate the receipt to view. **Please Note**: receipts are in order by date, newest on top. If there were several registration confirmation emails sent, they will all be listed separately


Receipts

Receipt
01/08/2019
01/08/2019
01/08/2019
12/28/2018
12/28/2018
12/21/2018
12/21/2018
12/18/2018
12/10/2018
12/06/2018
11/15/2018

5. Click on the date to view. The receipt will display in the Receipt section


Receipts

Receipt
01/08/2019
01/08/2019
01/08/2019
12/28/2018
12/28/2018
12/21/2018
12/21/2018
12/18/2018
12/10/2018
12/06/2018
11/15/2018

Receipt

N/AThis is a confirmaiton email that a parent will recieve when they register for a program.

Program: DCW Transactional- CENTER 1 Girl Scouts - Extra Programs - Extracurricular Activities 2018
We look forward to seeing you for our first Girl Scouts meeting on January 22!

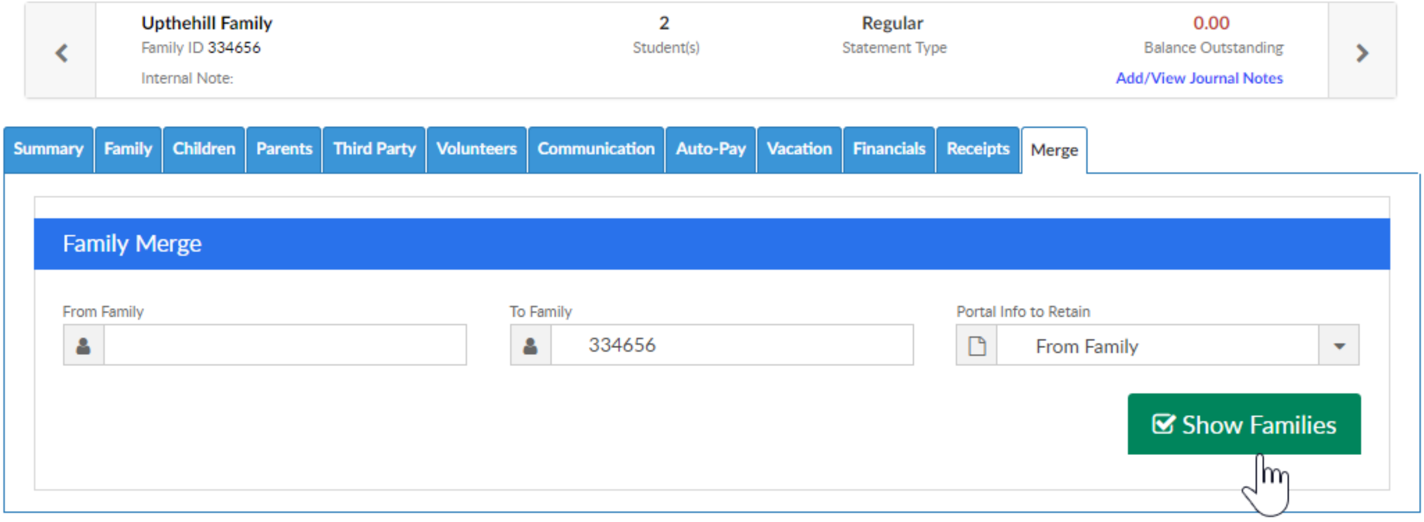
Thank you for registering with DCW Transactional

Family Record, Merge Tab

Last Modified on 01/04/2018 8:23 am EST

The Merge tab will allow users to merge families or move children from family to family.

From the family record, select the Merge option.



Upthehill Family
Family ID 334656
Internal Note:

2 Student(s)

Regular Statement Type

0.00 Balance Outstanding

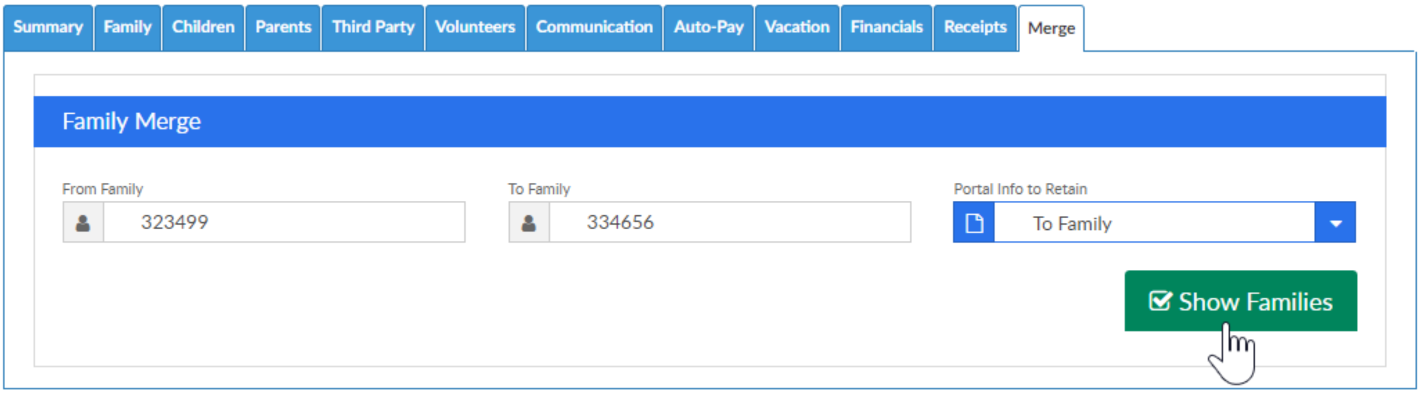
From Family:

To Family: 334656

Portal Info to Retain: From Family

- Enter the family ID that will be moving from or merging from in the From Family field.
- Enter the family ID that will be moving to or merging to in the To Family field.
- Select the Portal Info to Retain-
  - From Family (Family ID in the From Family field)
  - To Family(Family ID in the To Family field)

Once detail has been entered, select the Show Families button.



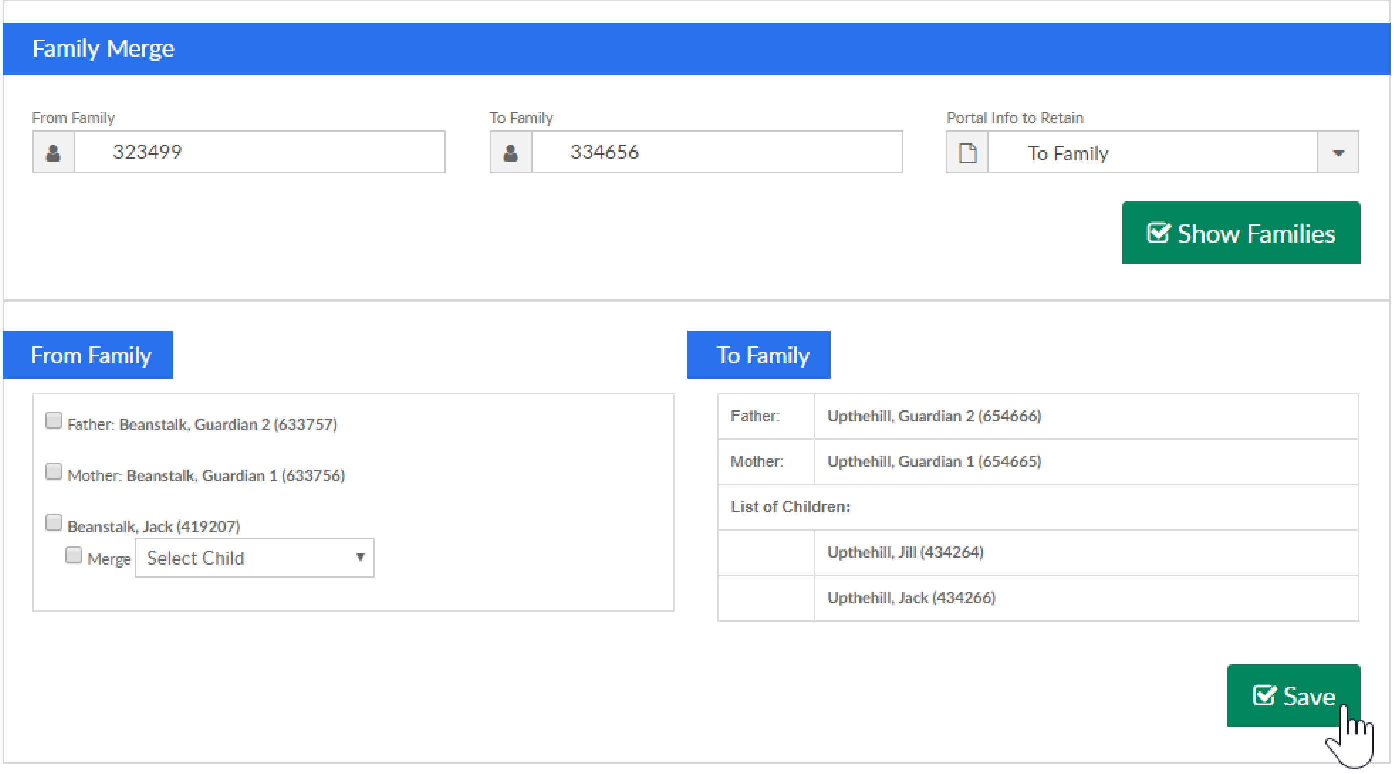
From Family: 323499

To Family: 334656

Portal Info to Retain: To Family

Once the families display check boxes will show next to each parent/guardian and child in the From Family column.

If the box is checked next to the user's name the user's detail will be merged over to the To family column.



From Family: 323499
To Family: 334656
Portal Info to Retain: To Family

From Family

☐ Father: Beanstalk, Guardian 2 (633757)
☐ Mother: Beanstalk, Guardian 1 (633756)
☐ Beanstalk, Jack (419207)
  ☐ Merge Select Child

To Family

Father:	Upthehill, Guardian 2 (654666)
Mother:	Upthehill, Guardian 1 (654665)
List of Children:	
	Upthehill, Jill (434264)
	Upthehill, Jack (434266)

- To merge father information check the box next to the father's name

From Family

☑ Father: Beanstalk, Guardian 2 (633757)
☐ Mother: Beanstalk, Guardian 1 (633756)
☐ Beanstalk, Jack (419207)
  ☐ Merge Select Child

To Family

Father:	Upthehill, Guardian 2 (654666)
Mother:	Upthehill, Guardian 1 (654665)
List of Children:	
	Upthehill, Jill (434264)
	Upthehill, Jack (434266)

- To merge mother information check the box next to the mother's name

☑ Father: Beanstalk, Guardian 2 (633757)

☑ Mother: Beanstalk, Guardian 1 (633756)

☐ Beanstalk, Jack (419207)

☐ Merge Select Child ▾

Father:	Upthehill, Guardian 2 (654666)
Mother:	Upthehill, Guardian 1 (654665)
List of Children:	
	Upthehill, Jill (434264)
	Upthehill, Jack (434266)

- To MOVE a child from the from family to the to family select the box next to the child's name

☐ Father: Beanstalk, Guardian 2 (633757)

☐ Mother: Beanstalk, Guardian 1 (633756)

☑ Beanstalk, Jack (419207)

☐ Merge Select Child ▾

Father:	Upthehill, Guardian 2 (654666)
Mother:	Upthehill, Guardian 1 (654665)
List of Children:	
	Upthehill, Jill (434264)
	Upthehill, Jack (434266)

- To MERGE a child, select drop down box in the Select Child field, then check the merge box and the check box next to the Child's Name- when children are merged the detail for the selected child is added to the detail for the child that is selected in the Select Child field.

☐ Father: Beanstalk, Guardian 2 (633757)

☐ Mother: Beanstalk, Guardian 1 (633756)

☑ Beanstalk, Jack (419207)

☑ Merge Upthehill, Jack (434266) ▾

Father:	Upthehill, Guardian 2 (654666)
Mother:	Upthehill, Guardian 1 (654665)
List of Children:	
	Upthehill, Jill (434264)
	Upthehill, Jack (434266)

If all children are moved or merged into a family the from family record will no longer display.

Merging/moving also moves the financial detail from the from family, to the to family.

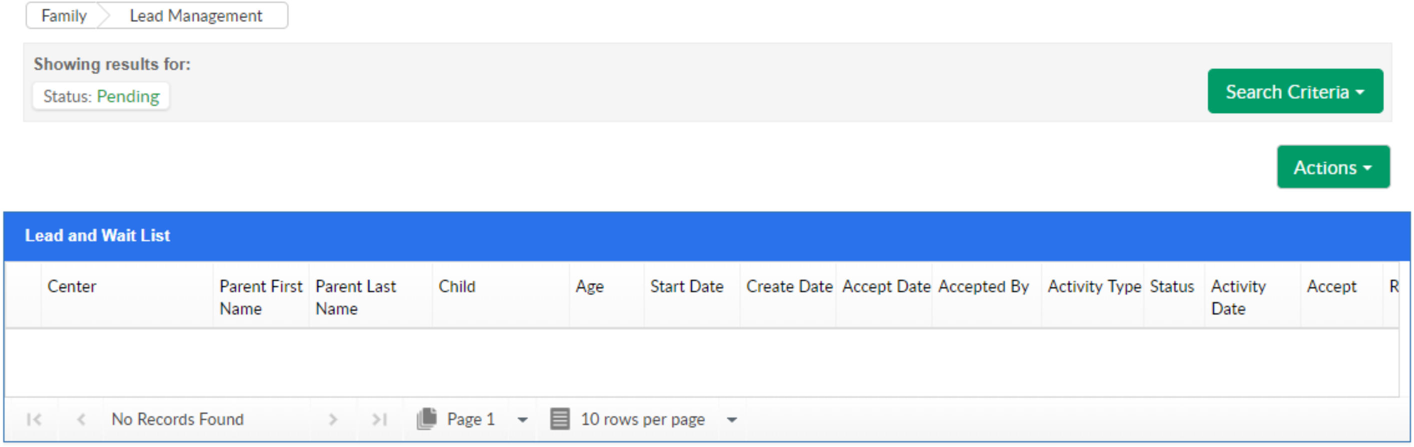
In order to merge users must have the Superuser role. If this is your first time merging- try it on one of your test families first to experiment!

Family > Lead Management

Last Modified on 10/24/2017 10:46 am EDT

The lead management area of the system allows centers to track potential family activity within the system before the family has actually been created. To access the lead management area select the Family option on the menu, then select Lead Management.

On the Family > Lead Management screen any pending children will display automatically. Pending children are children that are already a part of the lead process.



Showing results for:
Status: Pending

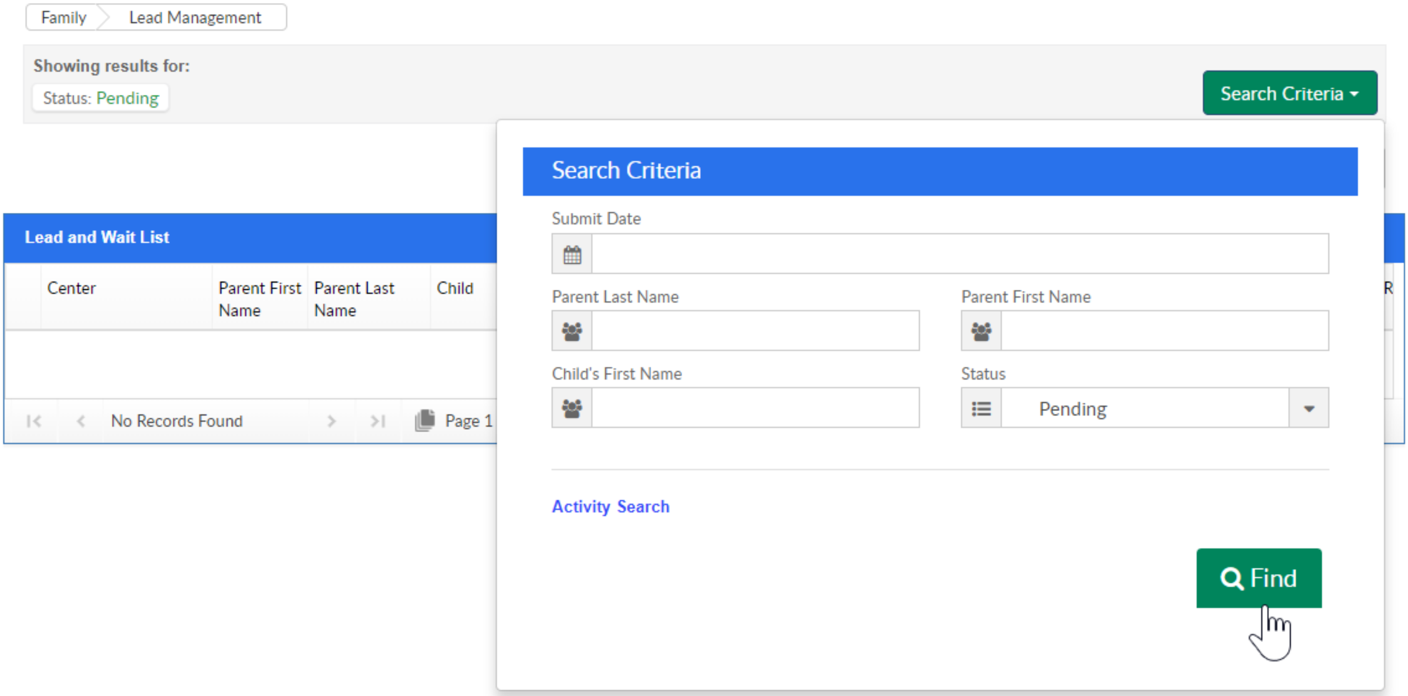
Lead and Wait List

	Center	Parent First Name	Parent Last Name	Child	Age	Start Date	Create Date	Accept Date	Accepted By	Activity Type	Status	Activity Date	Accept	R

No Records Found Page 1 10 rows per page

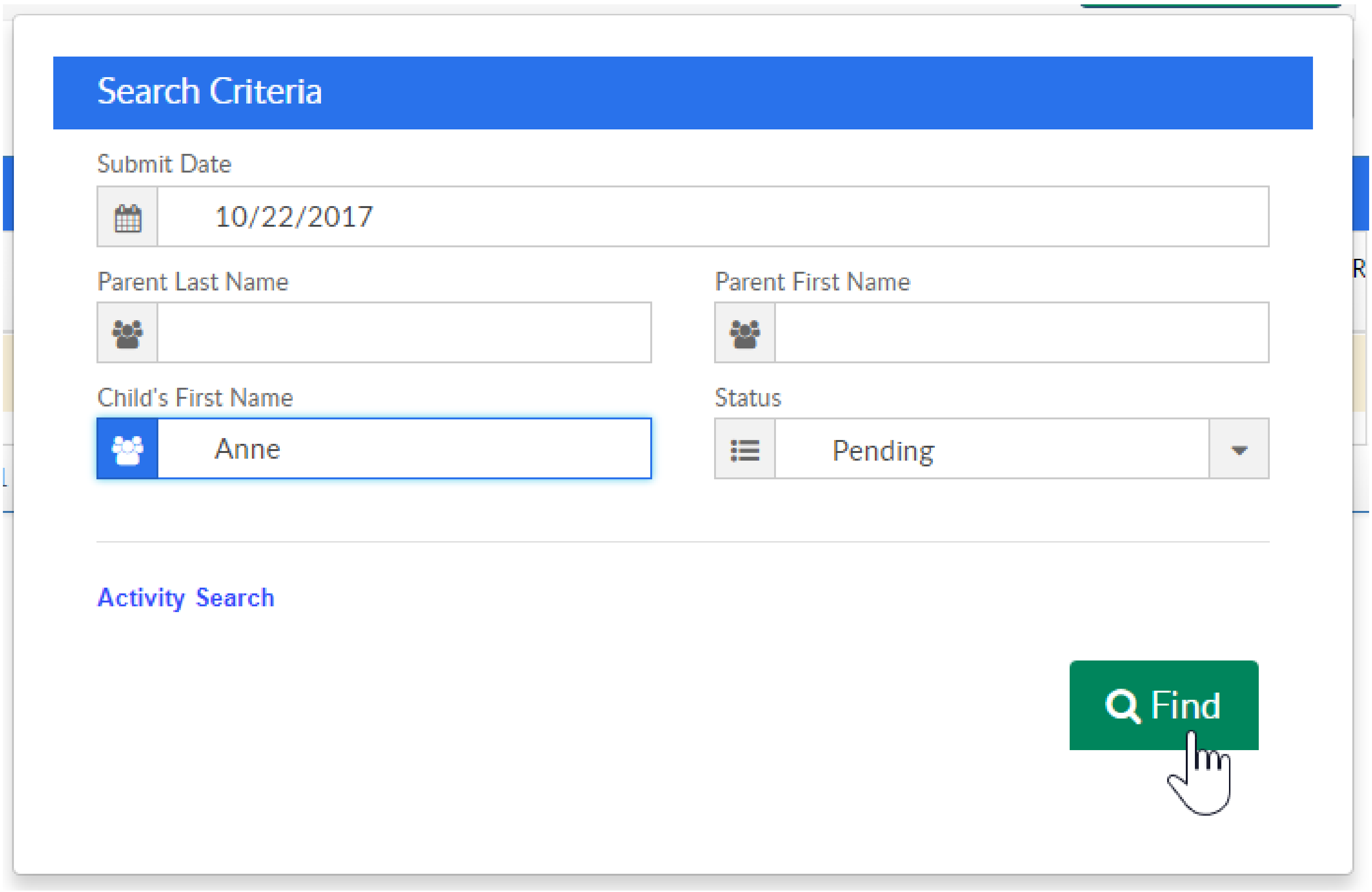
To change search criteria select the Search Criteria button. The below detail can be used to search for children/family data-

- Submit Date- the date you want to search as of- if results should display for the time between 7/1/17 and today, enter 7/1/17.
- Parent Last Name
- Parent First Name
- Child's First Name
- Status
    - Active- Child has been approved to the system and will display in family search results
    - Pending- Child is not active yet, will not appear in family search results
    - Rejected- Child's request for admittance has not been approved


Family > Lead Management

Showing results for:
Status: Pending

Once criteria has been entered press Find-


Search Criteria

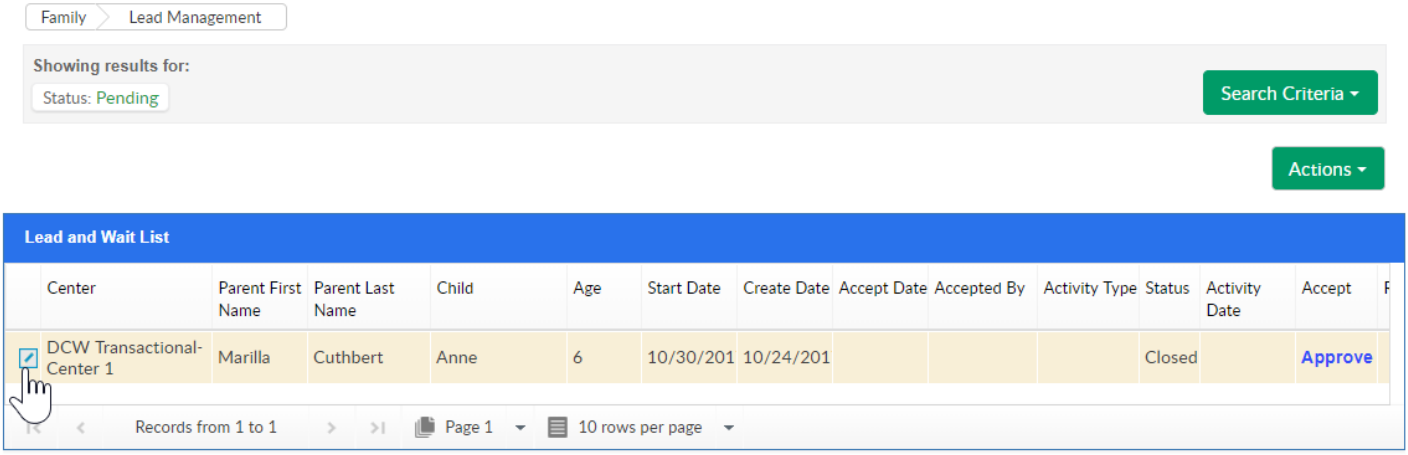
Submit Date: 10/22/2017

Child's First Name: Anne

Status: Pending

To edit a record select the green edit icon on the very left side, in the Lead and Wait List screen- Center, Parent First Name, Parent Last Name, Child Name, Age, Requested Start Date, Create Date, Accepted Date, Who the Child Was accepted by, Last Activity Type, Activity Status and Activity Date will display.

From this screen a child can be Accepted or Rejected into their requested program.



Showing results for:
Status: Pending

Lead and Wait List

	Center	Parent First Name	Parent Last Name	Child	Age	Start Date	Create Date	Accept Date	Accepted By	Activity Type	Status	Activity Date	Accept	F
✎	DCW Transactional-Center 1	Marilla	Cuthbert	Anne	6	10/30/201	10/24/201				Closed		Approve	

Select the Actions drop down menu to access the following options-

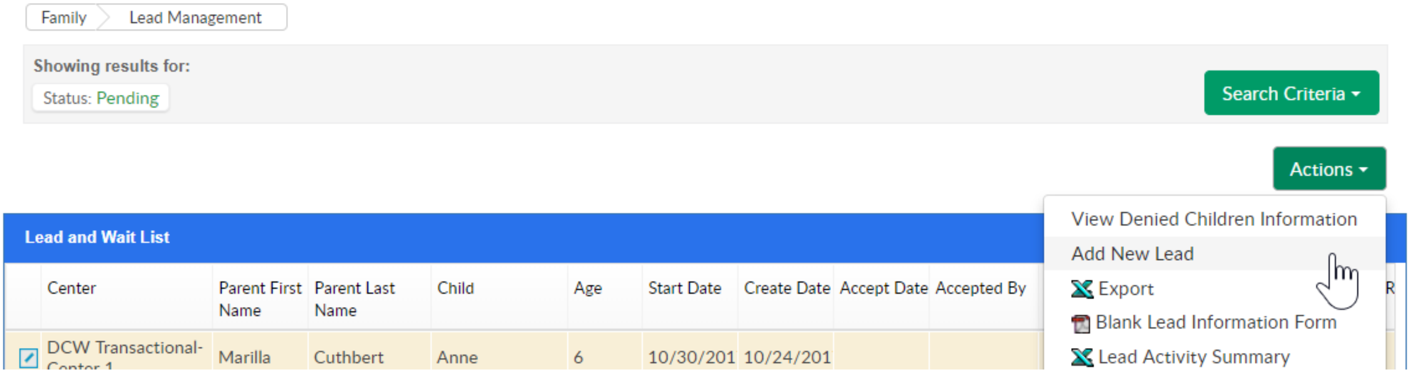
- View Denied Children Information- a shortcut to see children that have been rejected from the lead management process
- Add New Lead- Allows an admin user to manually add a lead
- Export- Exports information displayed from what has been entered in the Search Criteria area to Excel
- Blank Lead Information Form- Opens an empty lead information form as a PDF
- Lead Activity Summary-Exports lead activities to Excel
- View Calendar- A shortcut to view lead calendar events
- Alert Report- Opens the Lead Followup Alert Report as a PDF
- Tour Availability- A shortcut to the Family > Tour Availability area

How to add a new lead in lead management

Last Modified on 03/14/2018 9:19 am EDT

From the Family > Lead Management screen, new leads can be added. Leads should be composed of potential families that are interested in signing up for programs or events. Leads can be added manually from the admin side, or through a lead page that is setup by Cirrus Group and added by a client to their webpage.

When on the Lead Management page, select the Actions drop down menu, then select Add New Lead-



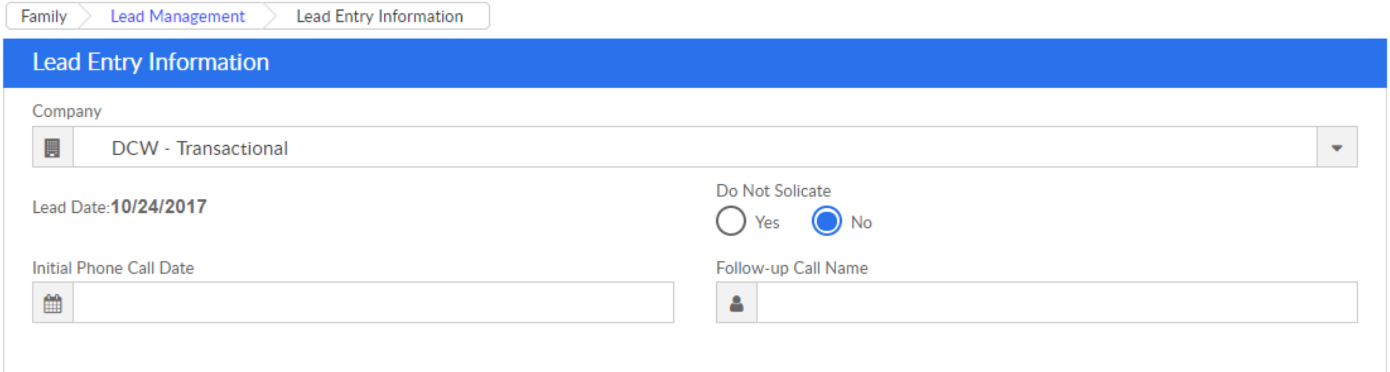
	Center	Parent First Name	Parent Last Name	Child	Age	Start Date	Create Date	Accept Date	Accepted By
	DCW Transactional-	Marilla	Cuthbert	Anne	6	10/30/201	10/24/201		

This will direct the user to the Lead Entry Information screen.

Note: the only required fields display with a red asterisk

The first portion of the screen will display the following fields-

- Company- select the center the child is interested in attending
- Do Not Solicit- Select Yes if the contact should be called/followed up with or No if the contact should not be called or contacted
- Initial Phone Call Date- Date of the first phone call/interest
- Follow-Up Call Name- Enter the name of the contact that initiated interest



Company
DCW - Transactional

Lead Date:**10/24/2017**

Do Not Solicate
○ Yes ● No

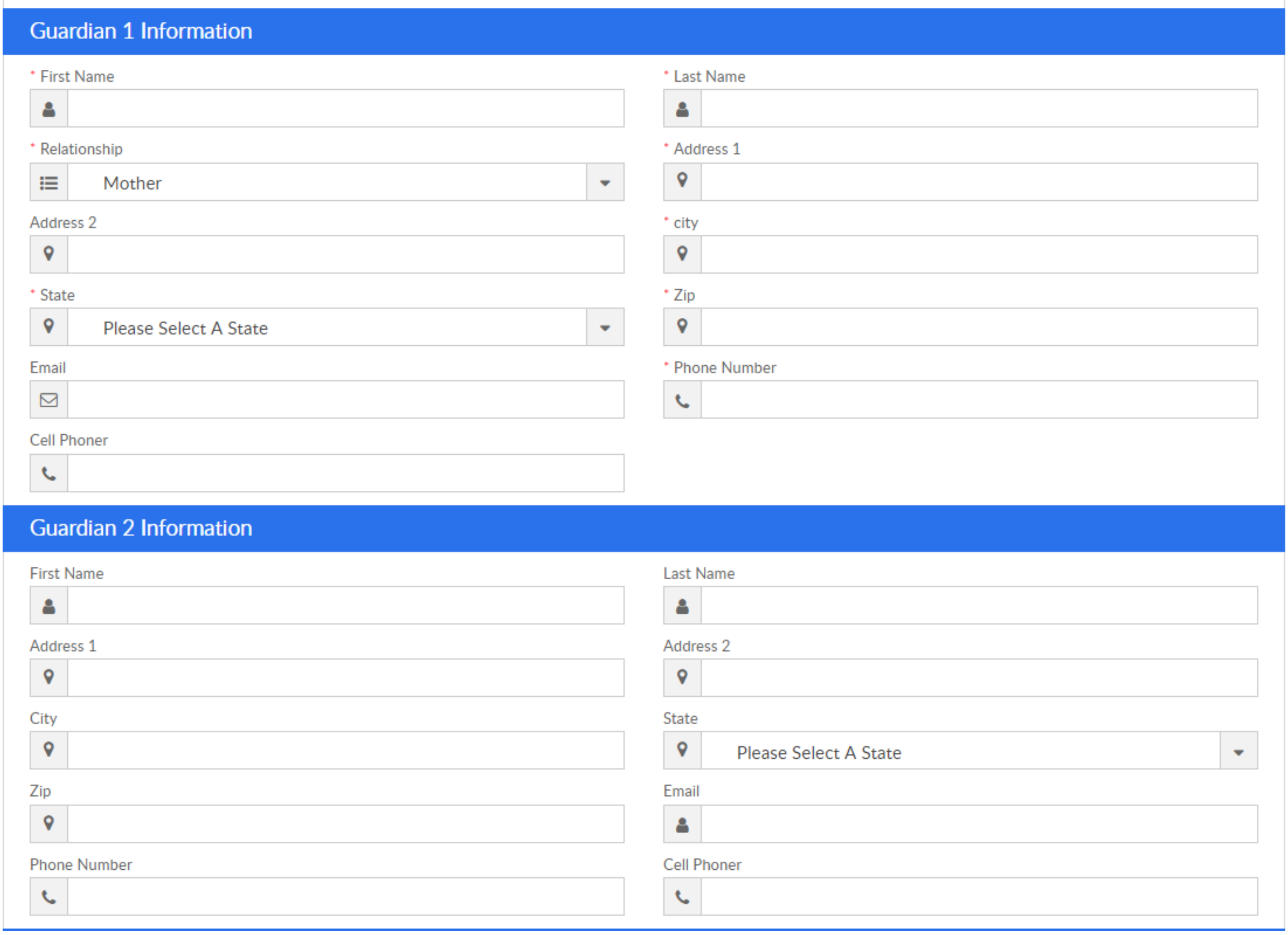
Initial Phone Call Date

Follow-up Call Name

The next section will display Guardian fields.

Note: Guardian 1 detail is required, guardian 2's information is not.

- First Name
- Last Name
- Relationship (options set under setup > system config, valid values)
- Address 1
- Address 2
- City
- State
- Zip
- Email
- Phone Number
- Cell Phone



Guardian 1 Information

* First Name

* Last Name

* Relationship: Mother

* Address 1

Address 2

* city

* State: Please Select A State

* Zip

Email

* Phone Number

Cell Phoner

Guardian 2 Information

First Name

Last Name

Address 1

Address 2

City

State: Please Select A State

Zip

Email

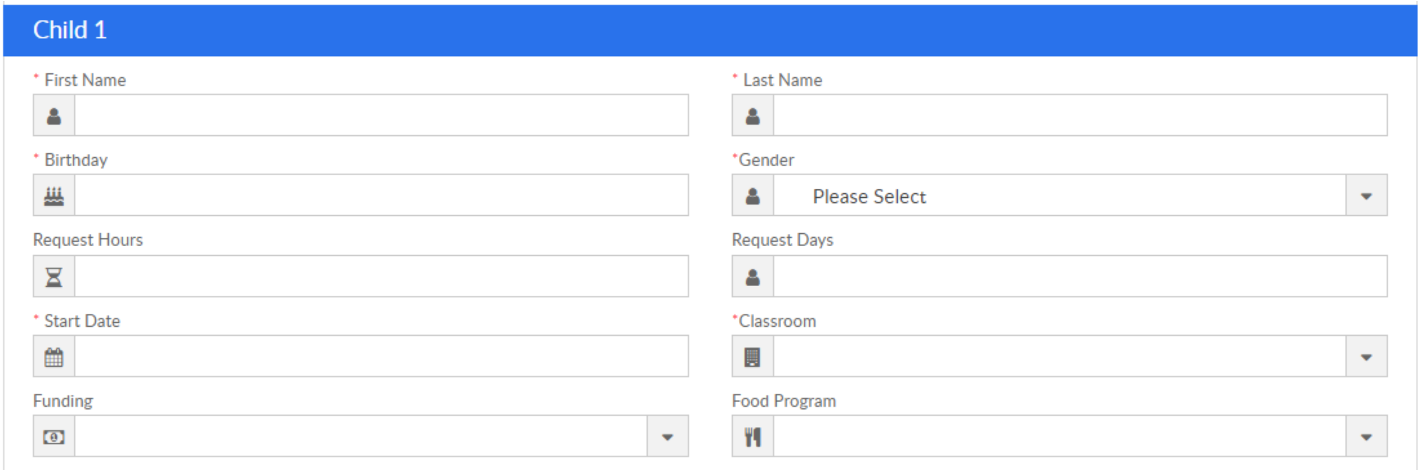
Phone Number

Cell Phoner

The next section will display Child fields (up to four children in the same family can be added under the same lead form).

- First Name
- Last Name
- Birthday
- Gender
- Requested Hours- enter the hours the family is interested in contracting for the child
- Requested Days- enter the days the family is interested in contracting for the child
- Start Date- enter the date the child will possibility begin attending the center/programs
- Classroom- enter the program/class/room the child will be attending (be sure to select the correct center's program)

- Funding- enter if the child will require sponsorship/assistance
- Food Program- select if the child will be Free, Paid or Reduced for the CACFP program


Child 1

* First Name

* Last Name

* Birthday

*Gender

Please Select

Request Hours

Request Days

* Start Date

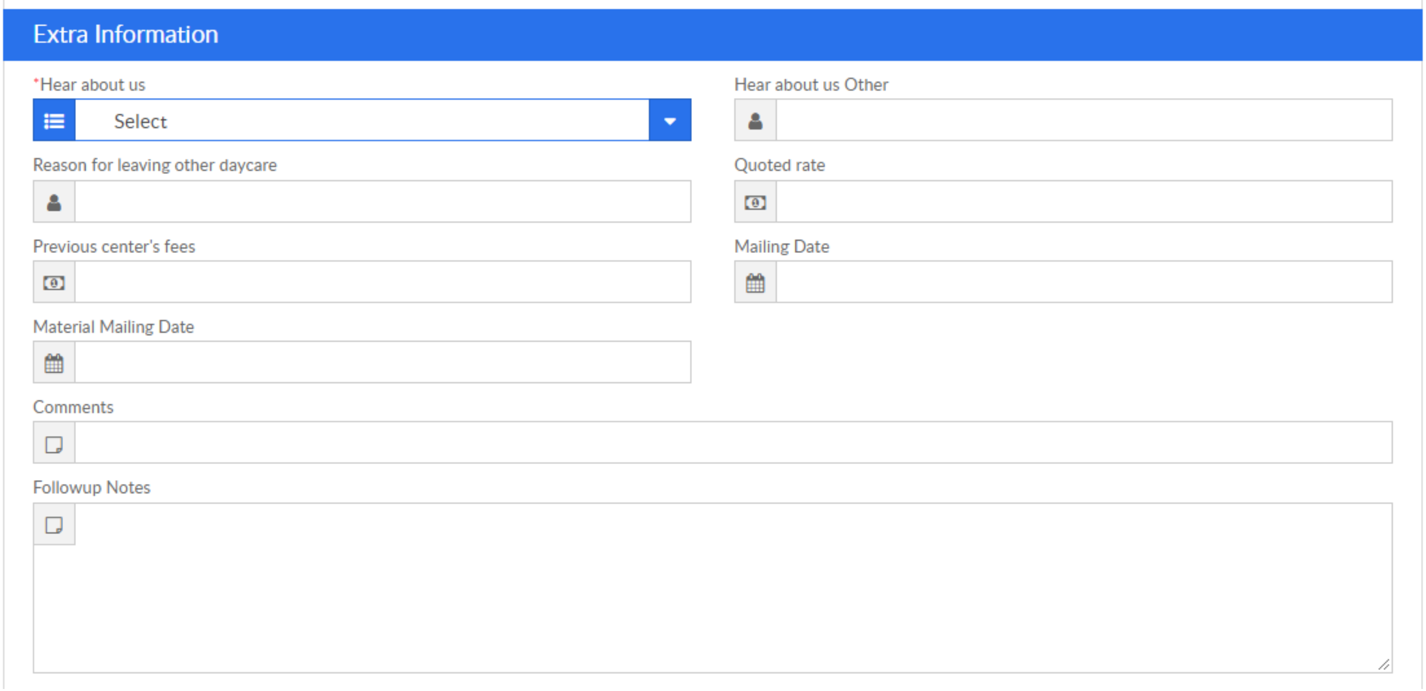
*Classroom

Funding

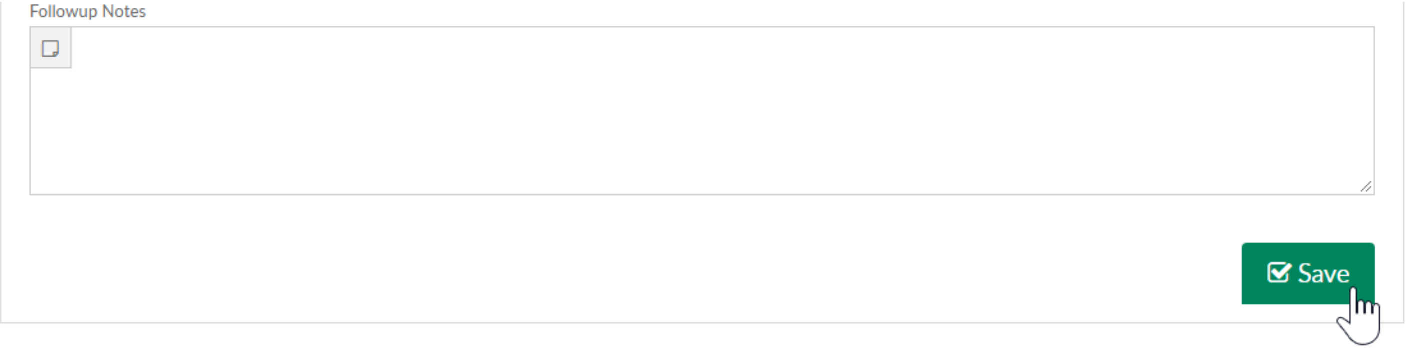
Food Program

The Extra Information section will display the following fields-

- Hear About Us- this section will only populate if valid values have been added for the Hear About Us Valid Value
- Hear About Us Other
- Reason for Leaving Other Daycare
- Quoted Rate
- Previous Center's Fees
- Mailing Date
- Material Mailing Date
- Comments
- Followup Notes

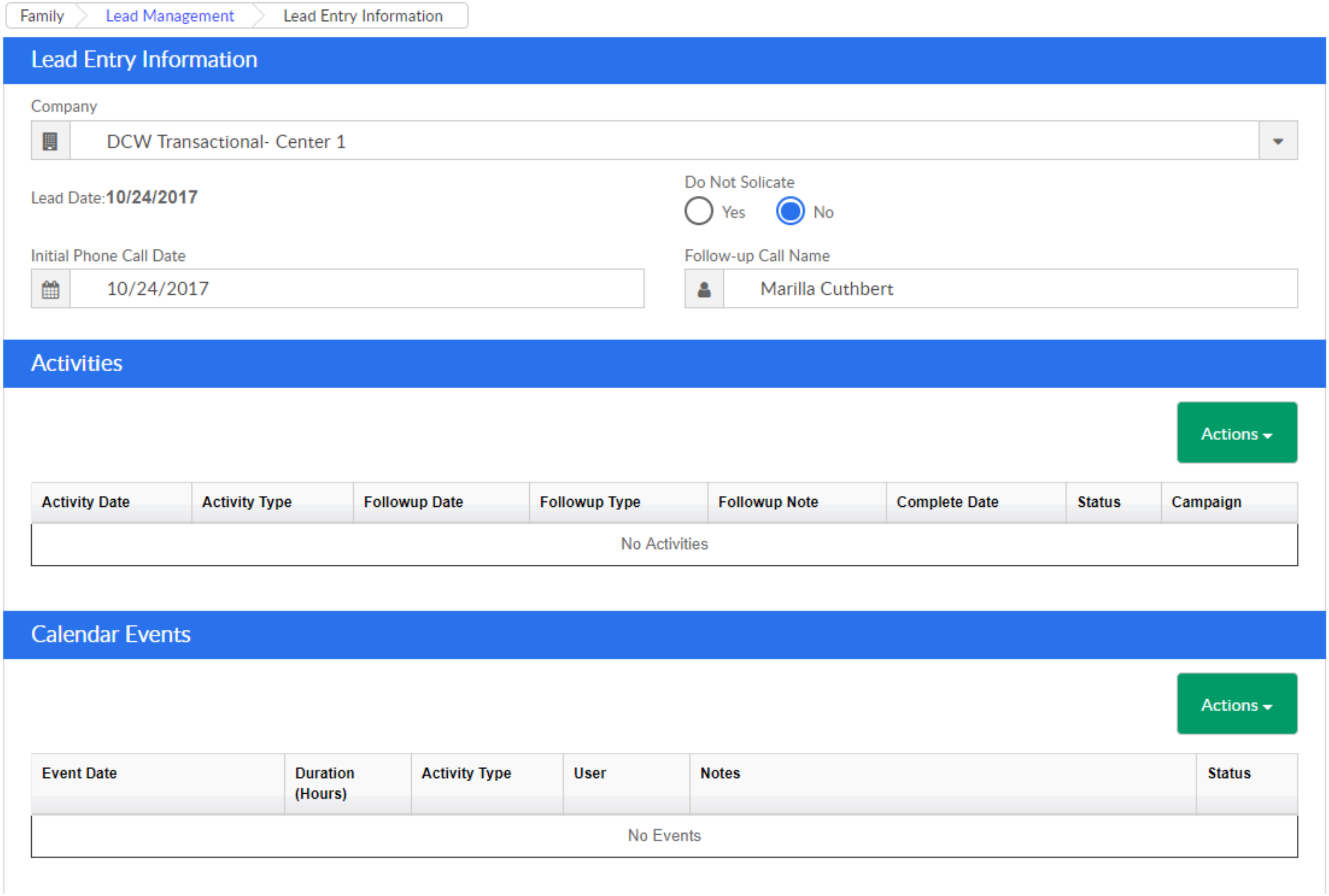


Once all detail has been entered, press Save.



The Lead Entry page will refresh and display the family's information as it has been entered. From here Activities or Calendar Events can be added to the family's lead information. To add new activities or calendar events select the Actions drop down menus.

- Lead Activities
- Calendar Events



Lead Entry Information

Company

DCW Transactional- Center 1

Lead Date:**10/24/2017**

Do Not Solicate

○ Yes ● No

Initial Phone Call Date

10/24/2017

Follow-up Call Name

Marilla Cuthbert

Activities

Activity Date	Activity Type	Followup Date	Followup Type	Followup Note	Complete Date	Status	Campaign
No Activities							

Calendar Events

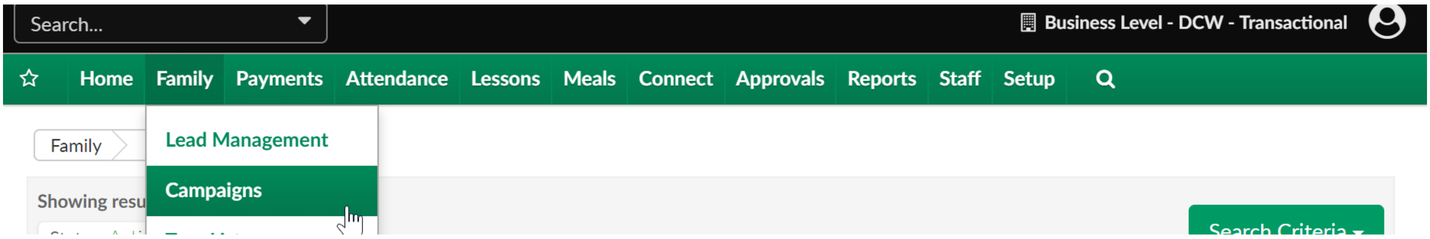
Event Date	Duration (Hours)	Activity Type	User	Notes	Status
No Events					

Family > Campaigns

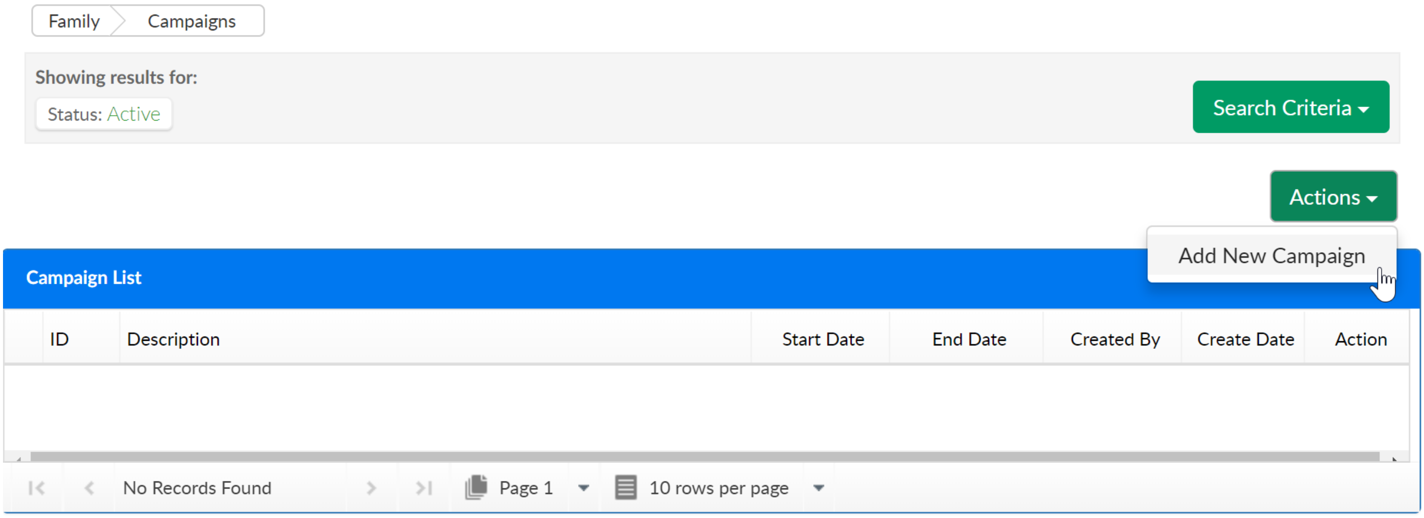
Last Modified on 04/05/2018 2:39 pm EDT

Campaigns allow sites to track activities related to particular marketing efforts.

From the Family menu option, select the Campaigns option.

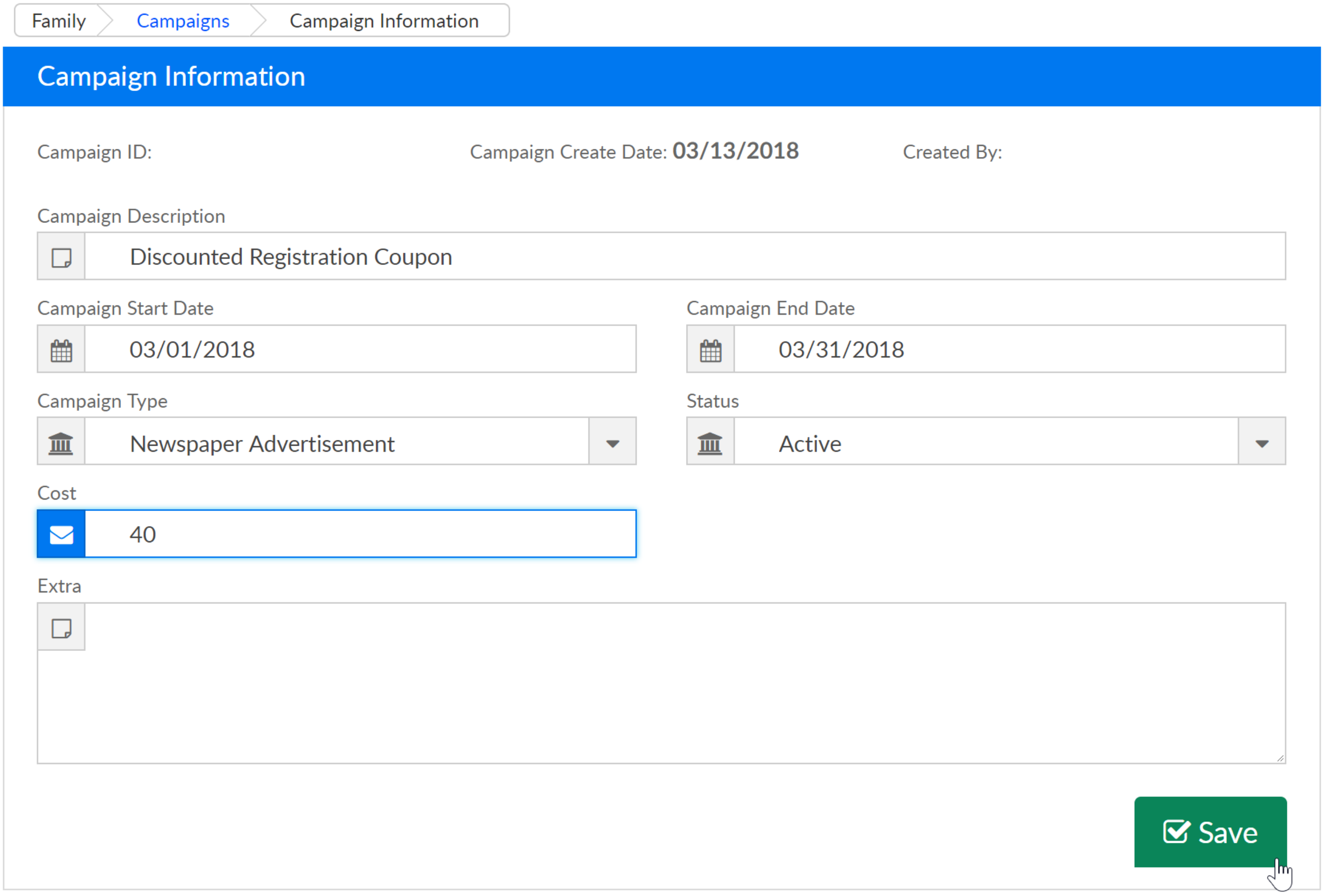


To add a new campaign select the actions menu, then select Add New Campaign.



Enter the below detail-

- Campaign Description- the name of the campaign
- Campaign Start Date- the date the campaign will begin
- Campaign End Date- the date the campaign will end
- Campaign Type- select the type of campaign that has been created
    - This value is setup in the setup > system config, valid values section under Campaign Type
- Status- set if the campaign is active or closed
- Cost- enter the cost of the campaign
- Extra- add any extra notes in this section



Campaign Information

Campaign ID:

Campaign Create Date: 03/13/2018

Created By:

Campaign Description: Discounted Registration Coupon

Campaign Start Date: 03/01/2018

Campaign End Date: 03/31/2018

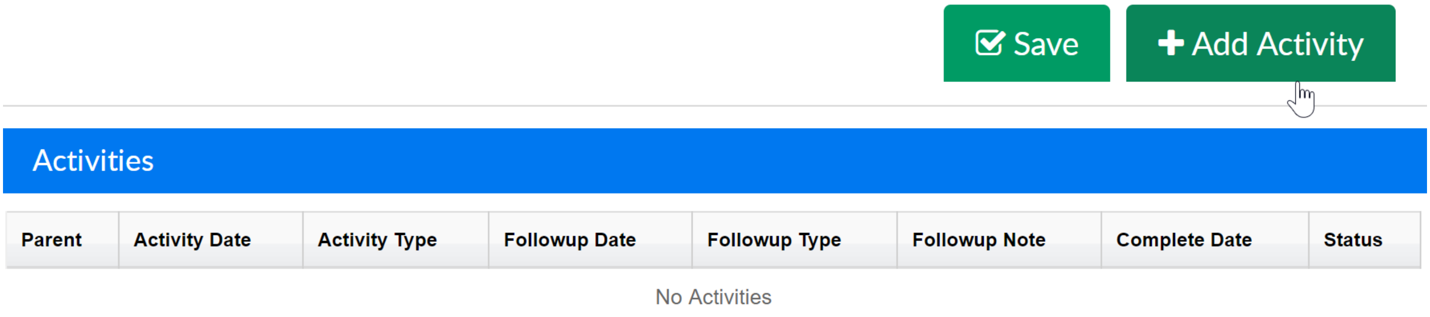
Campaign Type: Newspaper Advertisement

Status: Active

Cost: 40

Extra:

Once a campaign has been created activities can be added to the campaign by selecting the +Add Activity button.



Activities

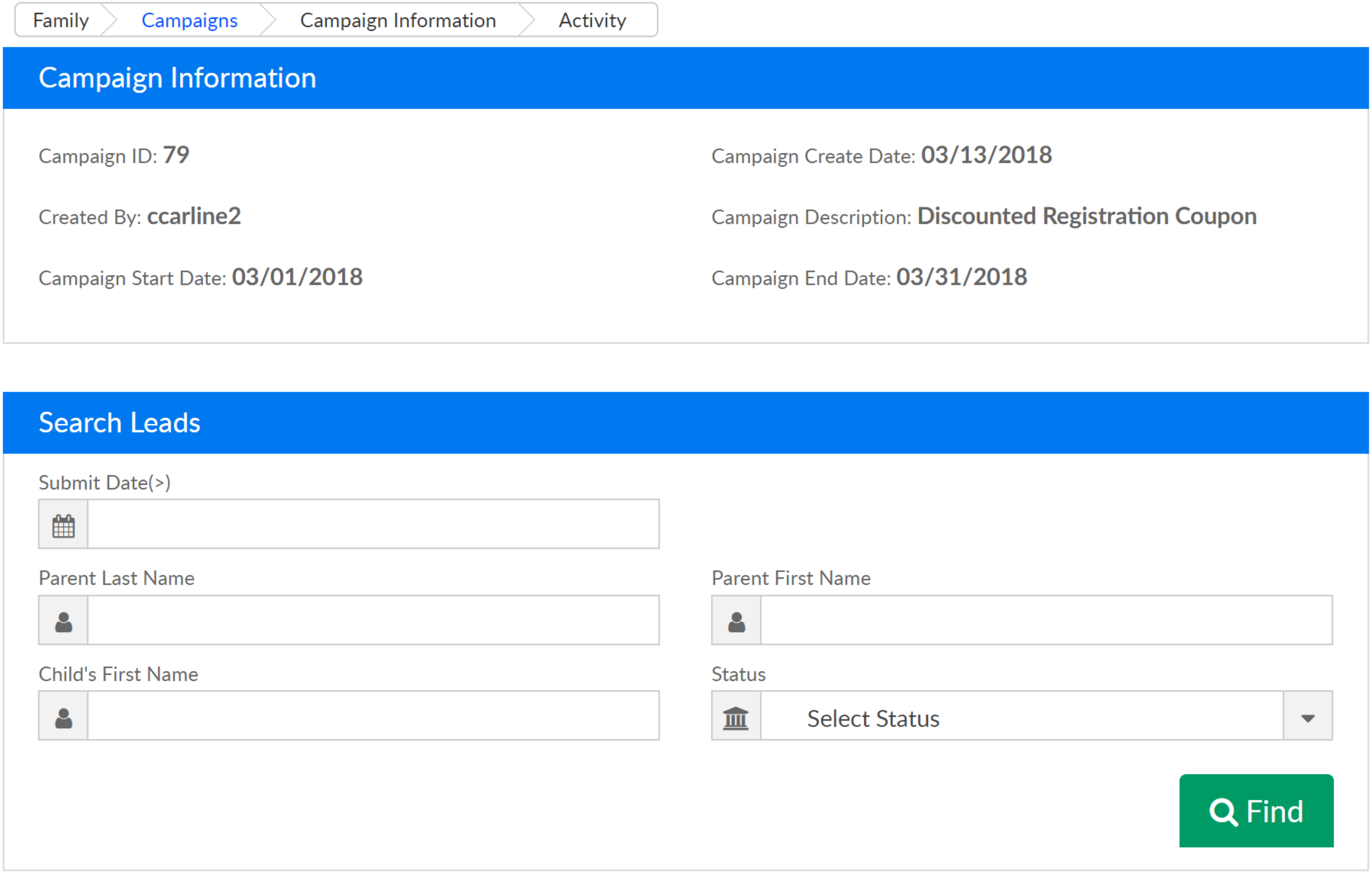
Parent	Activity Date	Activity Type	Followup Date	Followup Type	Followup Note	Complete Date	Status

No Activities

By default children on the lead and wait list will display. If searching for a specific family, enter search criteria, then press Find.

- Submit Date- the date the family was added to the lead list, when the date is entered the results will display anything greater than
- Parent Last Name
- Parent First Name

- Child's First Name
- Status- select if the lead is pending, approved or rejected



Campaign Information

Campaign ID: 79

Campaign Create Date: 03/13/2018

Created By: ccarline2

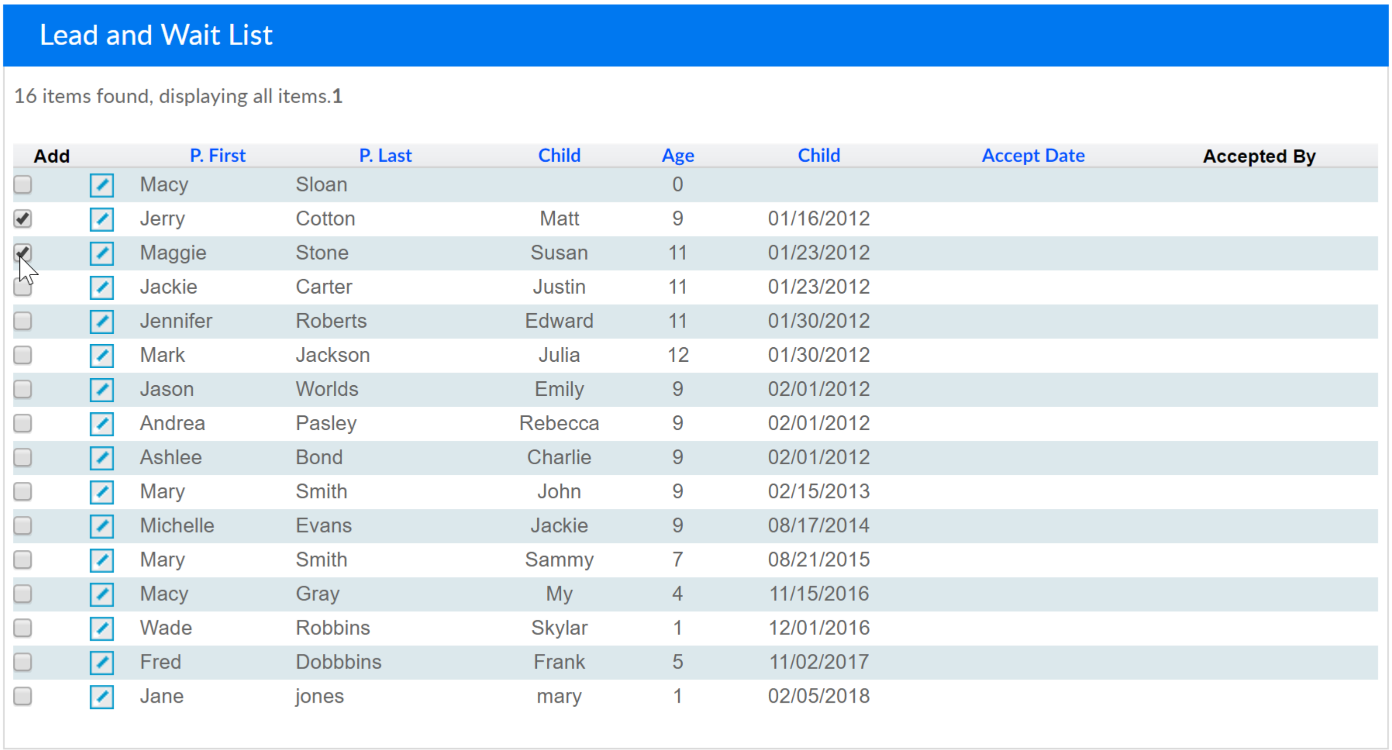
Campaign Description: Discounted Registration Coupon

Campaign Start Date: 03/01/2018

Campaign End Date: 03/31/2018

Search Leads

From the Lead and Wait List list check the box next to each family/child pairing that should have the activity added to their record.

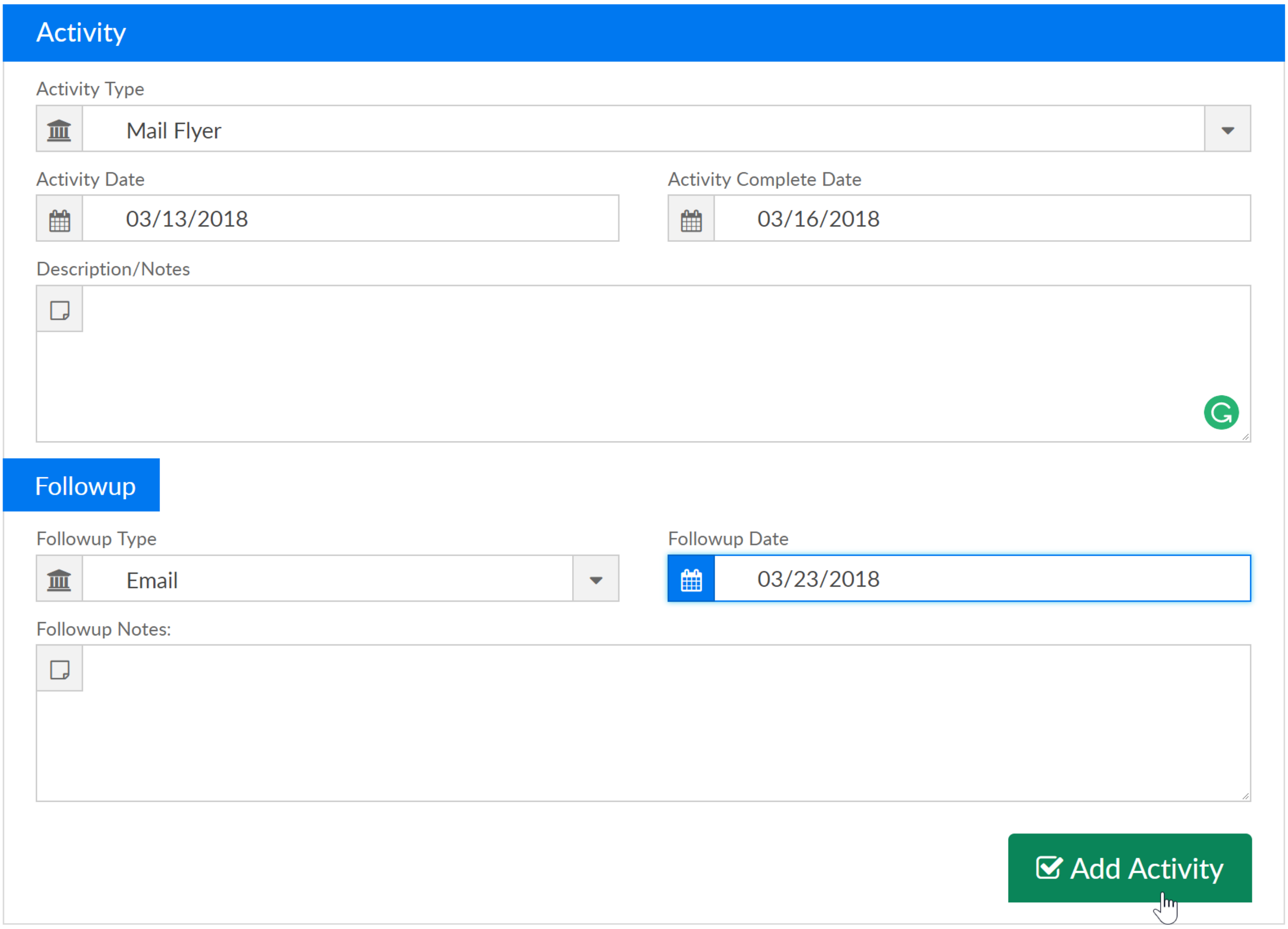


Lead and Wait List

16 items found, displaying all items.**1**

Add		P. First	P. Last	Child	Age	Child	Accept Date	Accepted By
☐	✎	Macy	Sloan		0			
☑	✎	Jerry	Cotton	Matt	9	01/16/2012		
☑	✎	Maggie	Stone	Susan	11	01/23/2012		
☐	✎	Jackie	Carter	Justin	11	01/23/2012		
☐	✎	Jennifer	Roberts	Edward	11	01/30/2012		
☐	✎	Mark	Jackson	Julia	12	01/30/2012		
☐	✎	Jason	Worlds	Emily	9	02/01/2012		
☐	✎	Andrea	Pasley	Rebecca	9	02/01/2012		
☐	✎	Ashlee	Bond	Charlie	9	02/01/2012		
☐	✎	Mary	Smith	John	9	02/15/2013		
☐	✎	Michelle	Evans	Jackie	9	08/17/2014		
☐	✎	Mary	Smith	Sammy	7	08/21/2015		
☐	✎	Macy	Gray	My	4	11/15/2016		
☐	✎	Wade	Robbins	Skylar	1	12/01/2016		
☐	✎	Fred	Dobbbins	Frank	5	11/02/2017		
☐	✎	Jane	jones	mary	1	02/05/2018		

Once families have been selected, add Activity detail in the Activity section and Followup (next steps) detail in the Followup section.



Activity

Activity Type: Mail Flyer

Activity Date: 03/13/2018

Activity Complete Date: 03/16/2018

Description/Notes:

Followup

Followup Type: Email

Followup Date: 03/23/2018

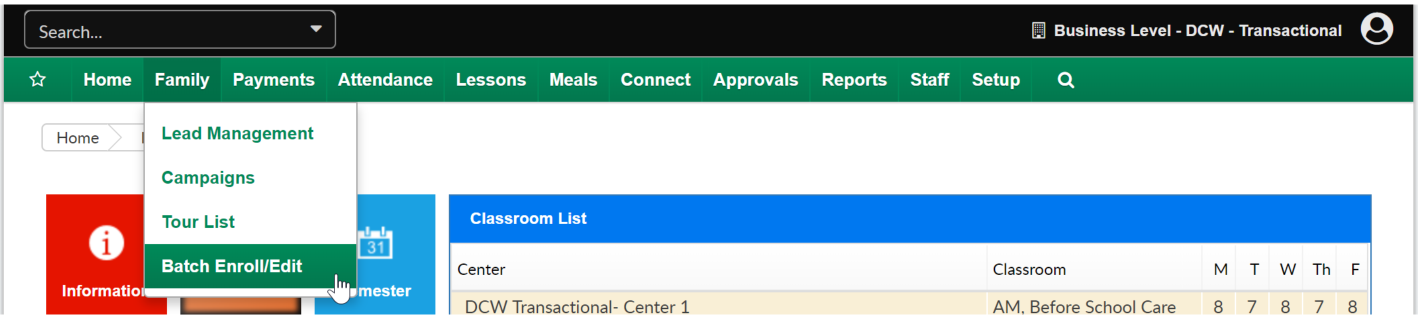
Followup Notes:

Family > Batch Enroll/Edit

Last Modified on 03/14/2018 9:20 am EDT

Batch enroll/edit allows users the ability to add or edit schedules for multiple children at a time.

From the family drop down menu select the Batch Enroll/Edit option-

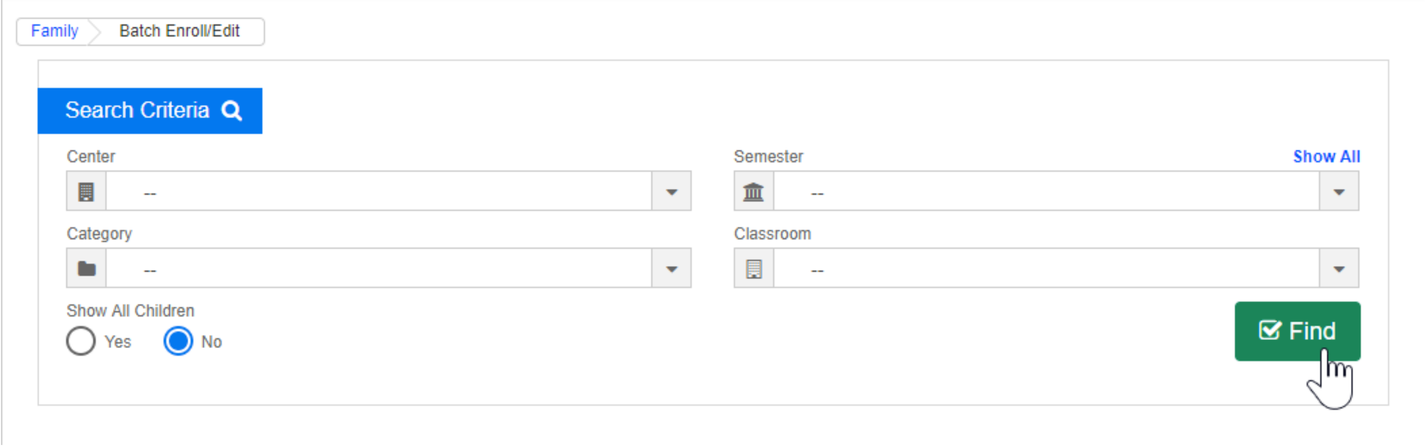


Classroom List

Center	Classroom	M	T	W	Th	F
DCW Transactional- Center 1	AM, Before School Care	8	7	8	7	8

Select the search criteria for the children you want to display, if you leave everything blank (as default) and select Show All Children- Yes all children will display for your business (you will not want to do this if you have many centers/many children). Once search criteria has been selected press Find.

- Center- select the center of the children you would like to display.
- Semester- select the semester of the children you would like to display, for children to display when you pull semester, it would mean the child had a program/room assignment for that semester.
- Category- select a category of programs from the drop down menu- any child that was/is associated with that category will display.
- Classroom- select a program from the drop down menu- any child that was/is associated with that program will display.
- Show All Children- select yes if all children associated to search criteria should display (active and inactive).



Family > Batch Enroll/Edit

Search Criteria

Center: --

Semester: -- Show All

Category: --

Classroom: --

Show All Children ○ Yes ● No

Find

The student list will display children that match the search criteria above.

The square to the very left is where a child can be selected/deselected to be included in the batch. If the box is selected any new program/room assignment will apply.

The edit icon will allow users to add/edit a particular child's program/room assignment.

Click on the child's name to jump to the family record.

Student List

Student	Family Name
☐ Brave, Merida (411030)	Brave Family
☐ Doolittle, Eliza (415031)	Doolittle Family
☐ Frozen, Anna (411022)	Frozen Family
☐ Frozen, Elsa (411018)	Frozen Family
☐ Peter Pan, Tinkerbell (411025)	Peter Pan Family
☐ Wonderland, Alice (415036)	Wonderland Family

Check All | Uncheck All

In this example, three children are going to be batch enrolled into a program-

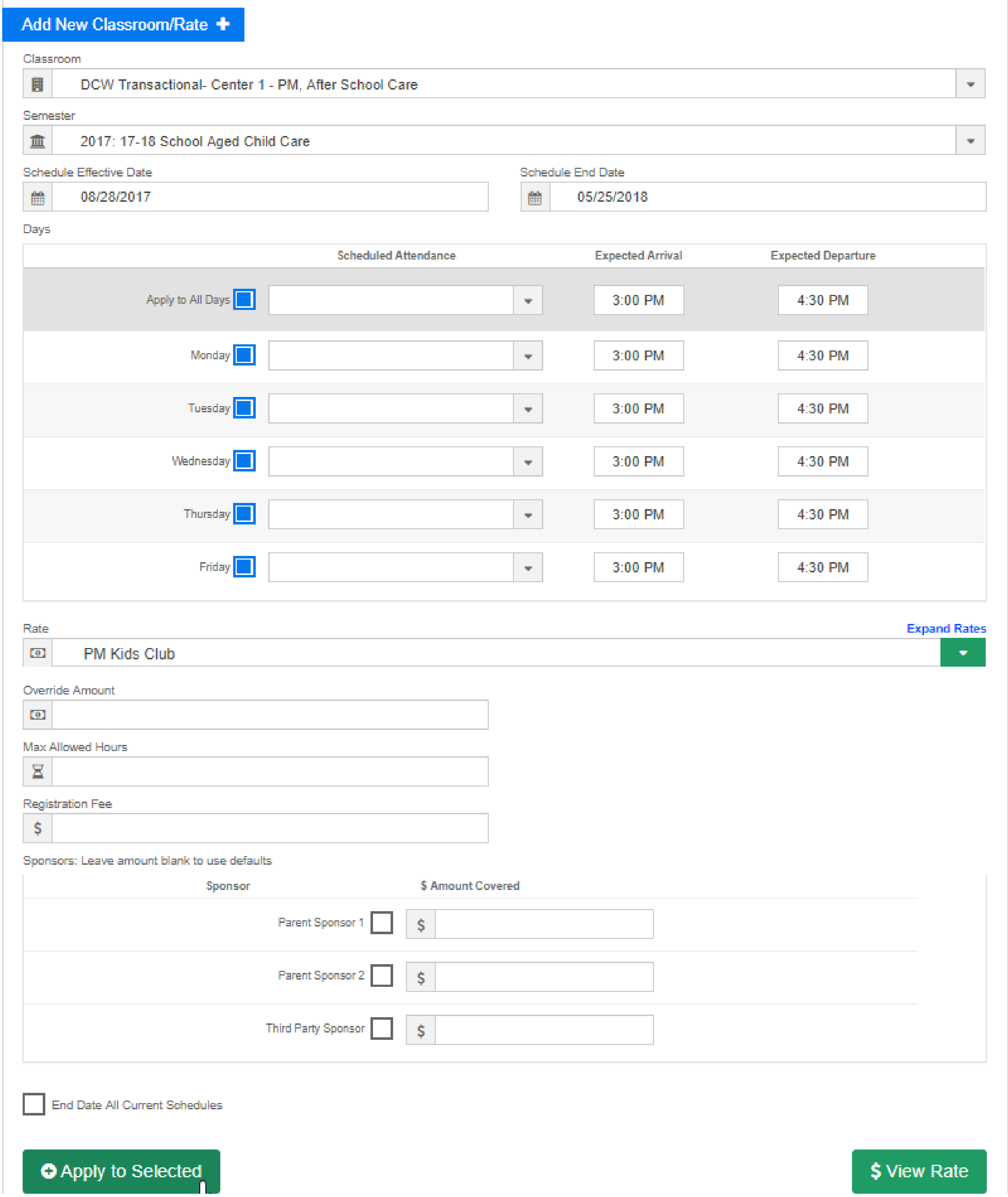
	Student	Family Name
☑	Brave, Merida (411030)	Brave Family
☑	Doolittle, Eliza (415031)	Doolittle Family
☑	Frozen, Anna (411022)	Frozen Family
☐	Frozen, Elsa (411018)	Frozen Family
☐	Peter Pan, Tinkerbell (411025)	Peter Pan Family
☐	Wonderland, Alice (415036)	Wonderland Family

After selecting the children scroll down to the Add New Classroom/Rate area, and select the information that will be added to the children. Remember this process is helping you add one program/dates and rates to all children selected. Once the program has been added to the children the children will start to display on rosters and sign-in sheets ass of the effective date that is selected in the Add New Classroom/Rate section.

- Classroom
- Semester
- Schedule Effective Date
- Schedule End Date
- Select Days and expected arrival/departure time
- Select a rate
- Enter an override amount (if applicable)
- Enter Max Allowed Hours (if applicable)
- Enter Registration Fee (if applicable)

In the sponsor section select sponsor 1, 2 or Third party sponsor if the children you are enrolling are part of split families. **Remember- whatever settings you enter here apply to ALL children selected.**

If current schedules should be end dated check the box labeled End Date All Current Schedules.



Classroom: DCW Transactional- Center 1 - PM, After School Care

Semester: 2017: 17-18 School Aged Child Care

Schedule Effective Date: 08/28/2017

Schedule End Date: 05/25/2018

Days

	Scheduled Attendance	Expected Arrival	Expected Departure
Apply to All Days ☑		3:00 PM	4:30 PM
Monday ☑		3:00 PM	4:30 PM
Tuesday ☑		3:00 PM	4:30 PM
Wednesday ☑		3:00 PM	4:30 PM
Thursday ☑		3:00 PM	4:30 PM
Friday ☑		3:00 PM	4:30 PM

Rate: PM Kids Club

Override Amount:

Max Allowed Hours:

Registration Fee: $

Sponsors: Leave amount blank to use defaults

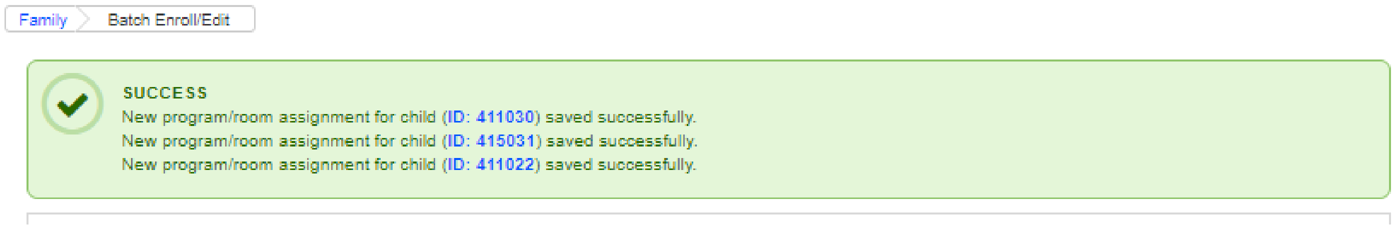
Sponsor	$ Amount Covered
Parent Sponsor 1 ☐	$
Parent Sponsor 2 ☐	$
Third Party Sponsor ☐	$

☐ End Date All Current Schedules

Press View Rate to see the expected amount selected families will be charged- **note this will only work for normal or flat rates**. This will not calculate the expected hourly rate if your site charges hourly based on schedule or attendance.

Press apply to selected to save the new program/room assignment to the selected children.

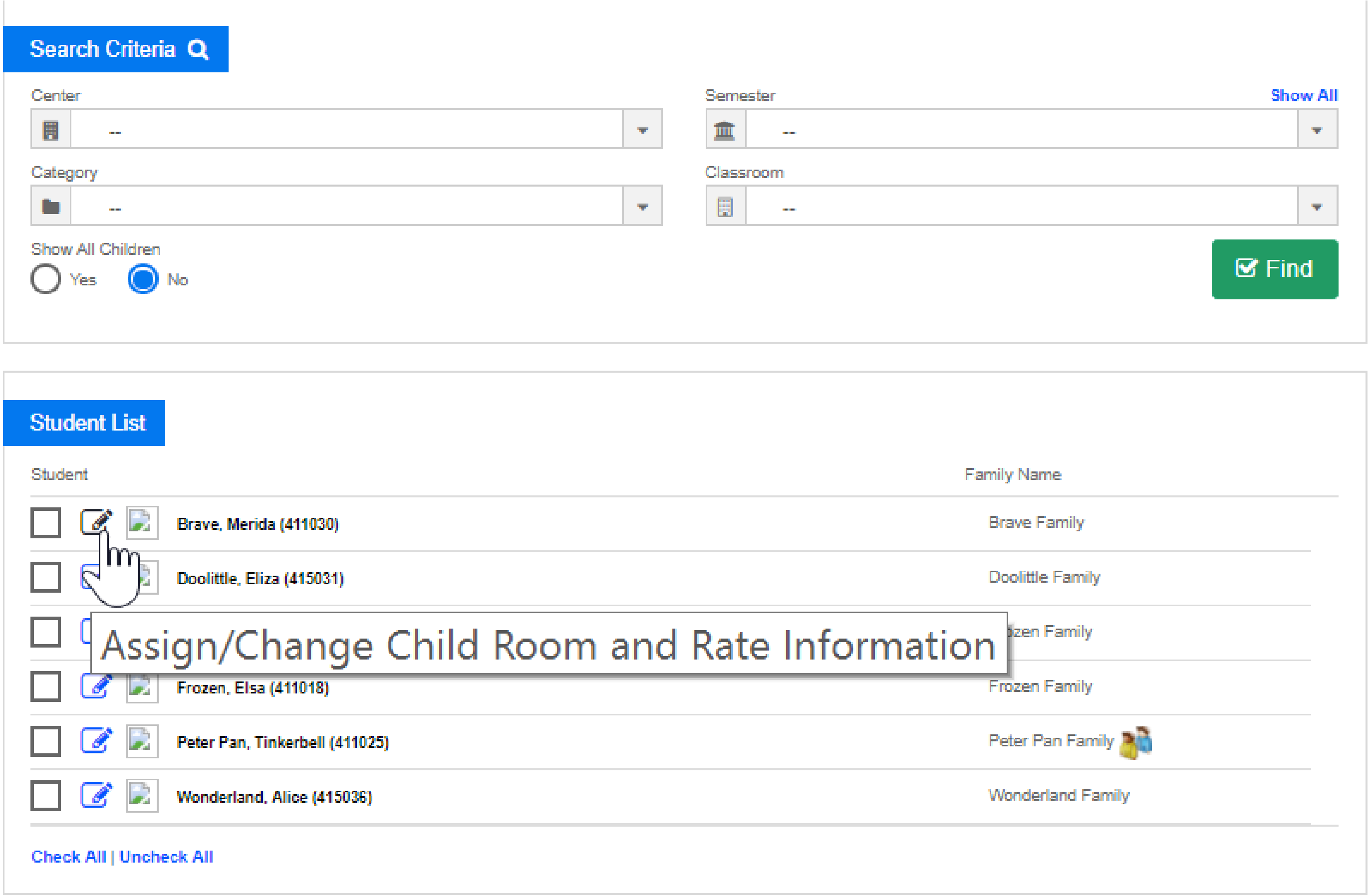
A confirmation box will appear at the top of the page confirming enrollment in the new program/room assignment has been successful. Select the Child's ID to jump to the child's record.



SUCCESS
New program/room assignment for child (ID: 411030) saved successfully.
New program/room assignment for child (ID: 415031) saved successfully.
New program/room assignment for child (ID: 411022) saved successfully.

Continue batch enrolling as needed. New search criteria can be entered, different children can be selected.

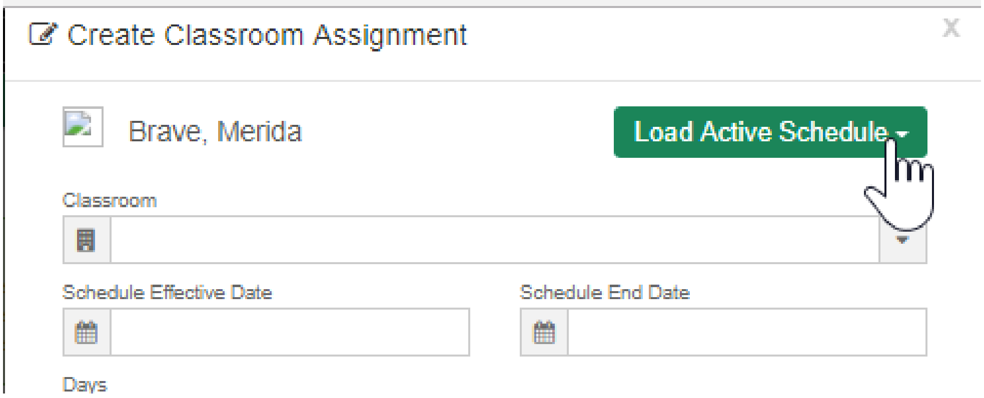
To add/edit a room assignment for a specific child select the edit icon-



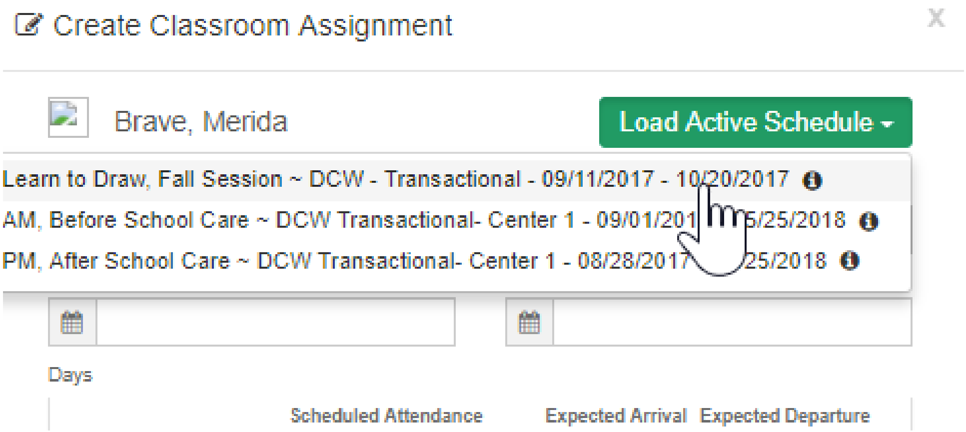
Center: --
Semester: --
Category: --
Classroom: --
Show All Children: ○ Yes ● No

	Student	Family Name
☐	Brave, Merida (411030)	Brave Family
☐	Doolittle, Eliza (415031)	Doolittle Family
☐		zen Family
☐	Frozen, Elsa (411018)	Frozen Family
☐	Peter Pan, Tinkerbell (411025)	Peter Pan Family
☐	Wonderland, Alice (415036)	Wonderland Family

To edit an existing schedule select the option to Load Active Schedule-



Once selected active schedules will display-

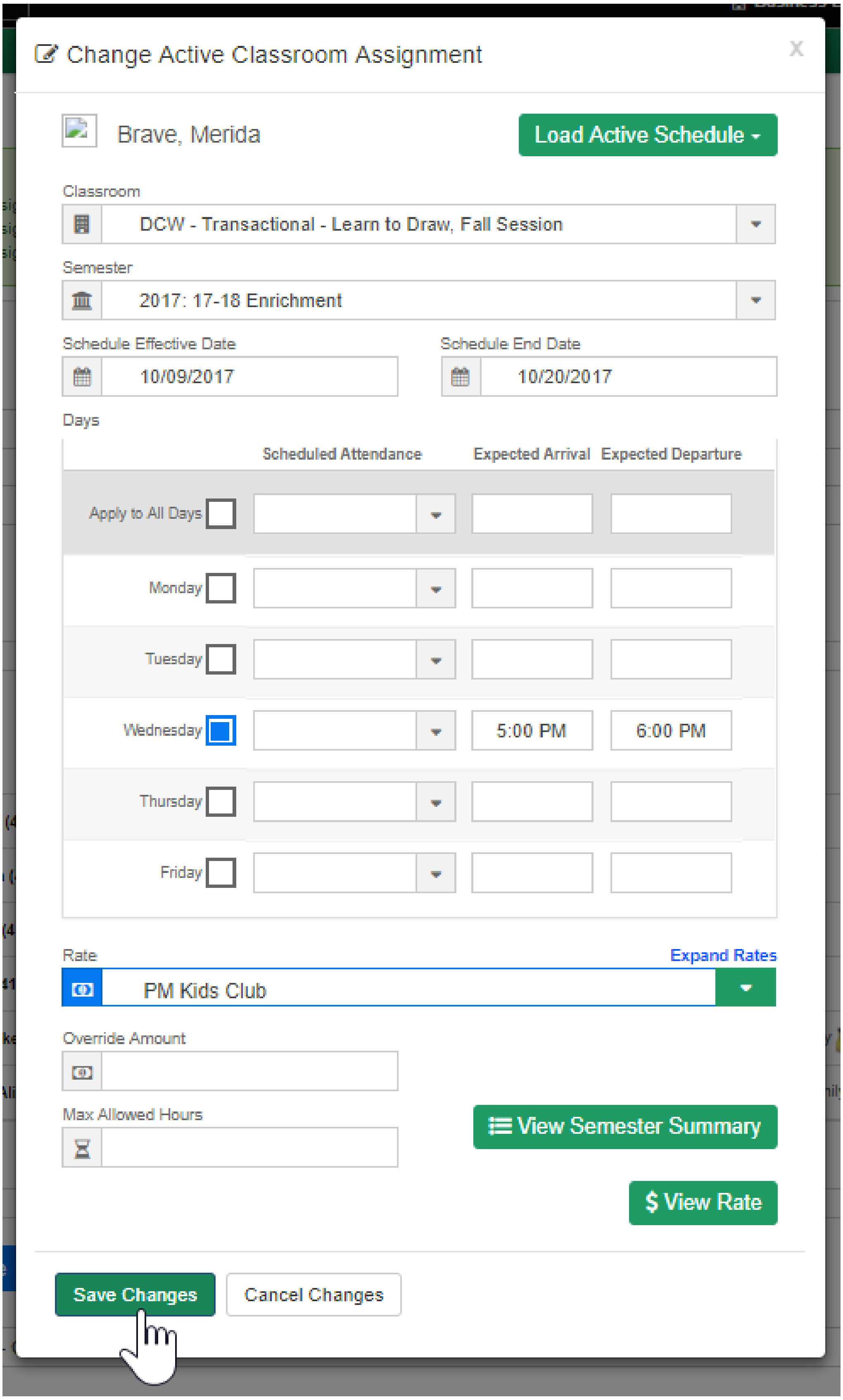


Learn to Draw, Fall Session ~ DCW - Transactional - 09/11/2017 - 10/20/2017

AM, Before School Care ~ DCW Transactional- Center 1 - 09/01/201 5/25/2018

PM, After School Care ~ DCW Transactional- Center 1 - 08/28/2017 25/2018

Enter the new effective date, then edit the schedule as needed- updating days attending, expected arrival/departure times, rates, override amounts etc. then press Save Changes.



Change Active Classroom Assignment

Brave, Merida

Classroom: DCW - Transactional - Learn to Draw, Fall Session

Semester: 2017: 17-18 Enrichment

Schedule Effective Date: 10/09/2017

Schedule End Date: 10/20/2017

Days

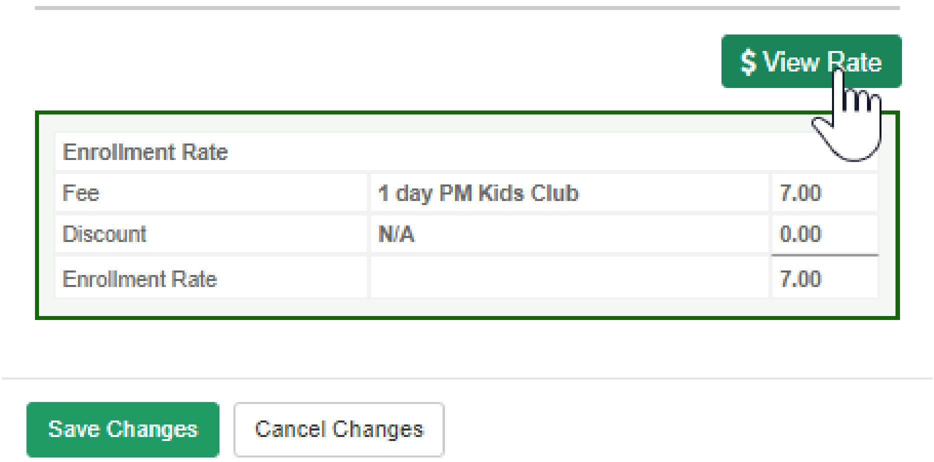
	Scheduled Attendance	Expected Arrival	Expected Departure
Apply to All Days ☐			
Monday ☐			
Tuesday ☐			
Wednesday ☑		5:00 PM	6:00 PM
Thursday ☐			
Friday ☐			

Rate: PM Kids Club

Override Amount:

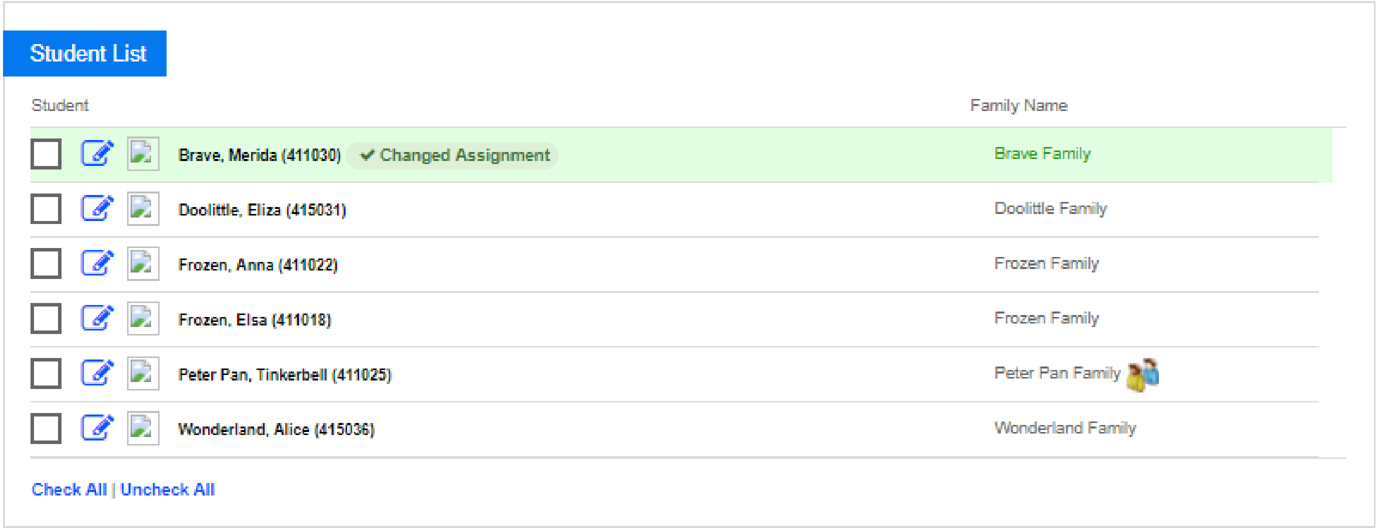
Max Allowed Hours:

Select View Rate to see an estimation of cost-



Enrollment Rate		
Fee	1 day PM Kids Club	7.00
Discount	N/A	0.00
Enrollment Rate		7.00

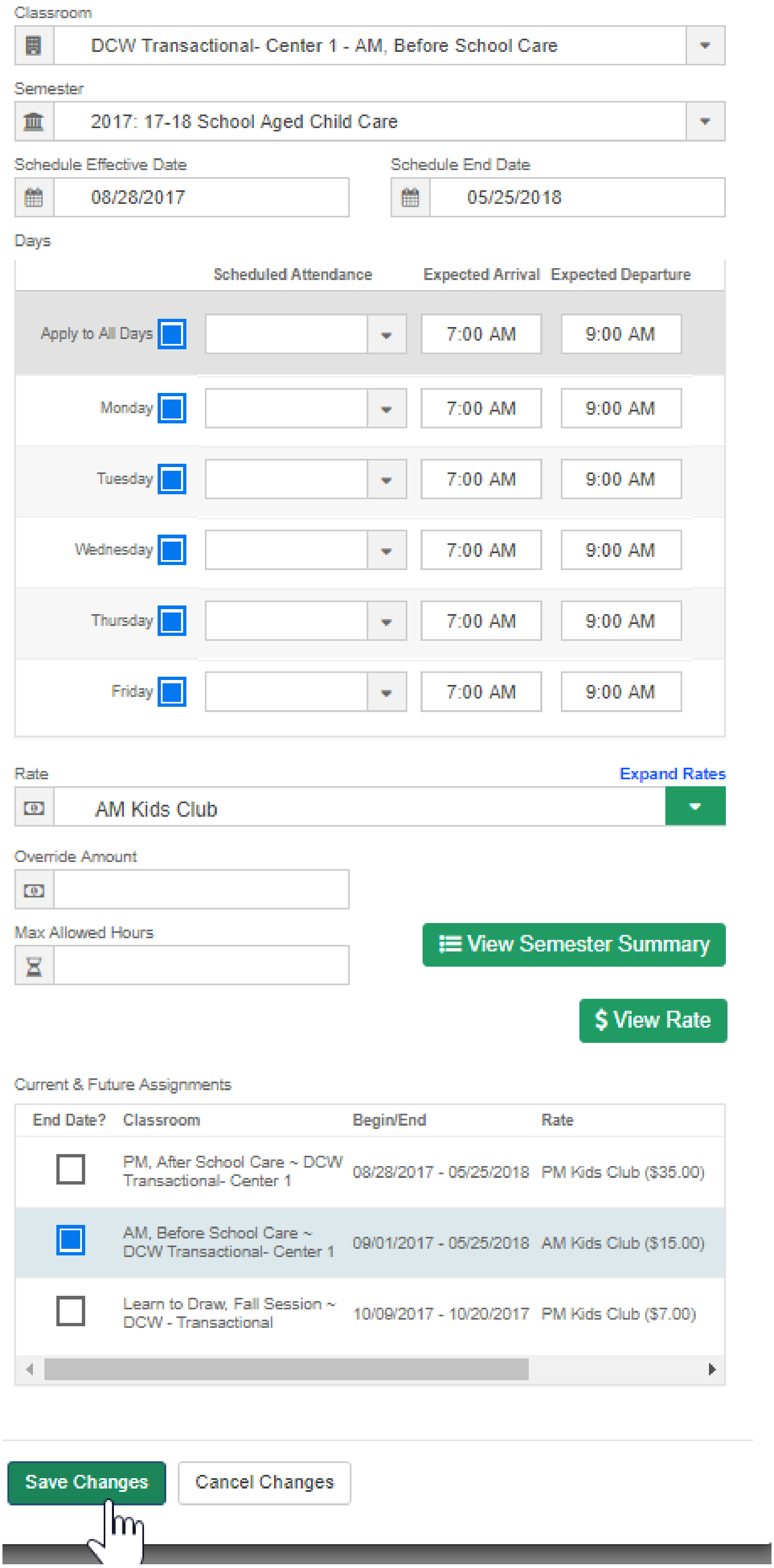
Once saved confirmation text will display on the students line under the student list-



Student	Family Name
☐ Brave, Merida (411030) ✓ Changed Assignment	Brave Family
☐ Doolittle, Eliza (415031)	Doolittle Family
☐ Frozen, Anna (411022)	Frozen Family
☐ Frozen, Elsa (411018)	Frozen Family
☐ Peter Pan, Tinkerbell (411025)	Peter Pan Family
☐ Wonderland, Alice (415036)	Wonderland Family

Continue as needed.

If a new schedule is being added for an individual child, enter classroom, semester, effective date, end date, days, times, rate, override amount and max allowed hours. If a current schedule should be end dated select the box next to the schedule, then press Save Changes.



Classroom

DCW Transactional- Center 1 - AM, Before School Care

Semester

2017: 17-18 School Aged Child Care

Schedule Effective Date: 08/28/2017

Schedule End Date: 05/25/2018

Days

	Scheduled Attendance	Expected Arrival	Expected Departure
Apply to All Days ☑		7:00 AM	9:00 AM
Monday ☑		7:00 AM	9:00 AM
Tuesday ☑		7:00 AM	9:00 AM
Wednesday ☑		7:00 AM	9:00 AM
Thursday ☑		7:00 AM	9:00 AM
Friday ☑		7:00 AM	9:00 AM

Rate

AM Kids Club

Override Amount

Max Allowed Hours

Current & Future Assignments

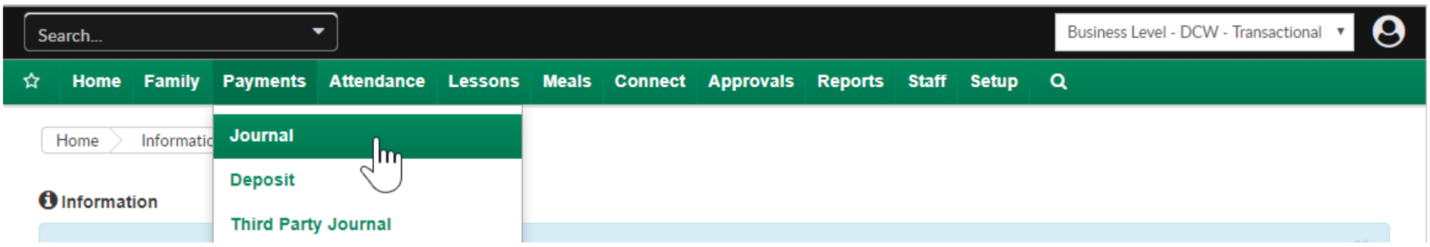
End Date?	Classroom	Begin/End	Rate
☐	PM, After School Care ~ DCW Transactional- Center 1	08/28/2017 - 05/25/2018	PM Kids Club ($35.00)
☑	AM, Before School Care ~ DCW Transactional- Center 1	09/01/2017 - 05/25/2018	AM Kids Club ($15.00)
☐	Learn to Draw, Fall Session ~ DCW - Transactional	10/09/2017 - 10/20/2017	PM Kids Club ($7.00)

Payments > Journal

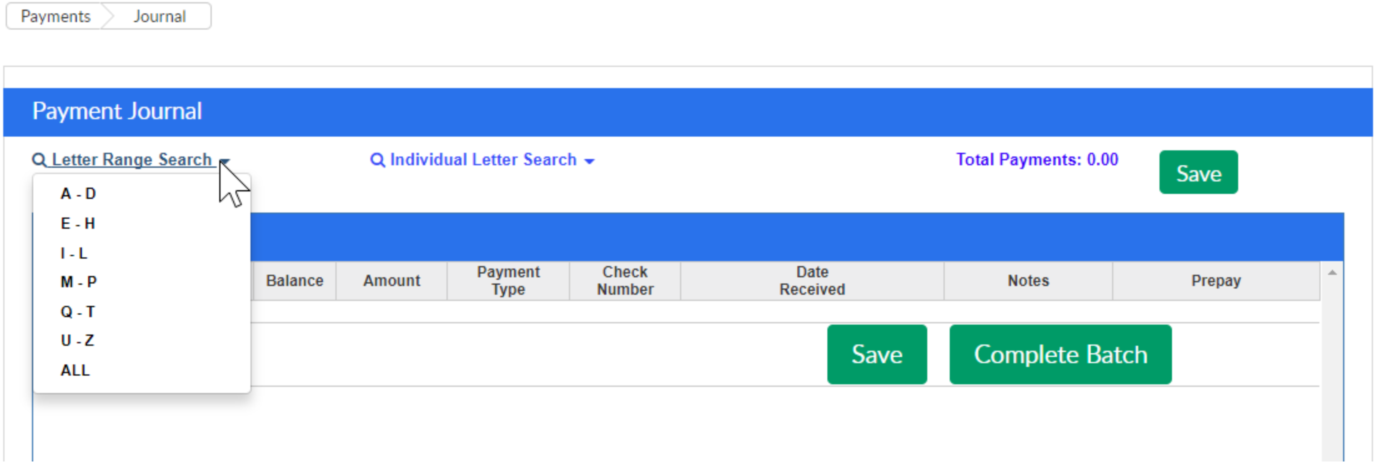
Last Modified on 05/30/2018 2:28 pm EDT

The Payments > Journal-page allows users to receipt payments by family in batch format. Do not receipt online payments through this method that need to be processed through a payment gateway, the only payments that should be receipted here are typically- cash, check, money order or another type of off-line payment.

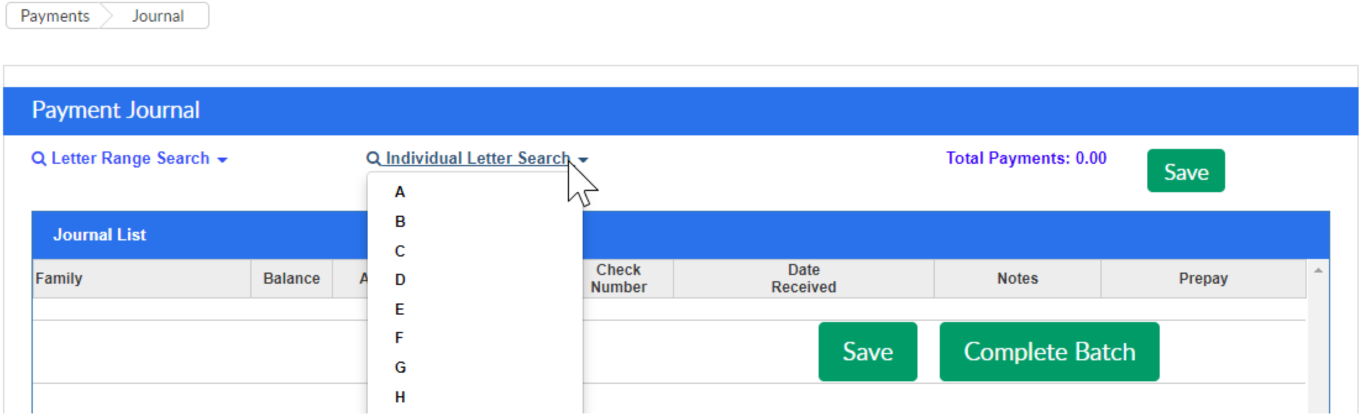
From the payments drop down menu select the Journal option.



To start, select either the letter range or the individual letter of the family's last name for the payment you want to receipt. Press All if you want to see all families.

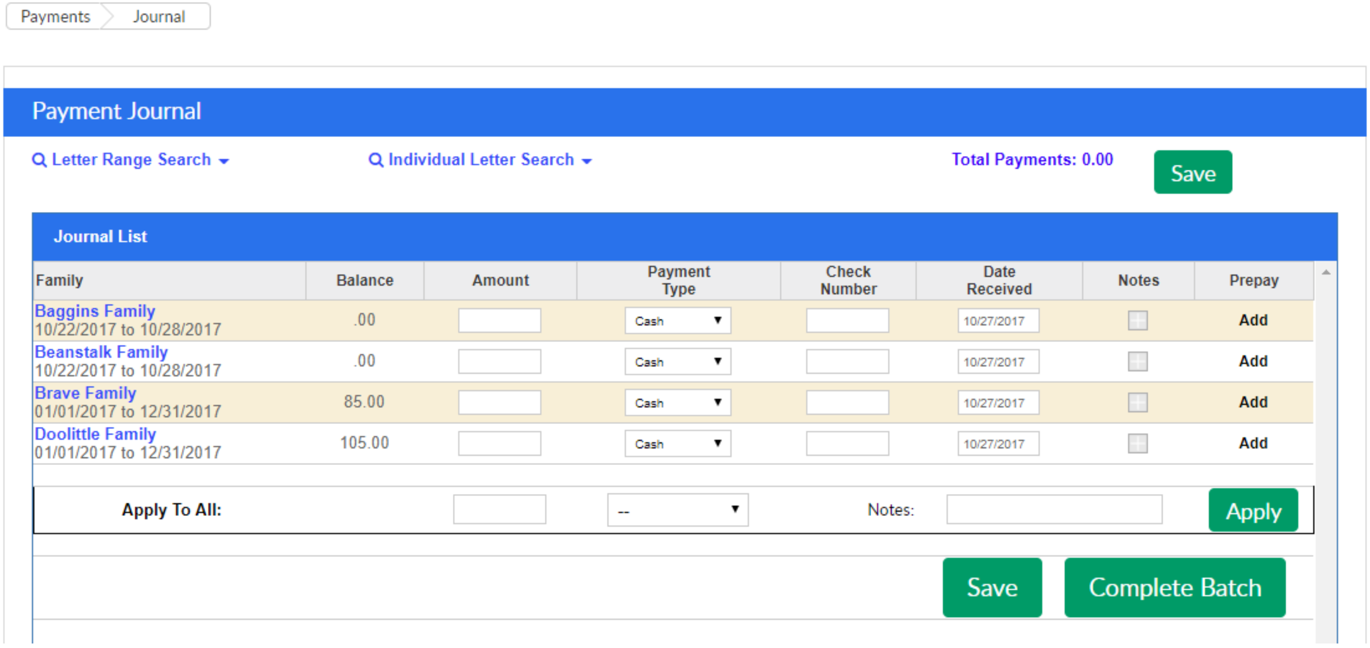


or



This will bring up families that have the last name that matches the search criteria. In the journal list the below fields display-

- Family- last name of the family and date of the family's last balance due
- Balance- amount the family owes
- Amount- amount of the payment (this will be entered by the user creating the receipts)
- Payment Type- the type of payment being receipted (the options in the drop-down list are populated by going to setup > system config, Valid Values)
- Check Number- enter the check number only if the payment type is a check
- Date Received- date the payment was received
- Notes- if any notes should be added to the payment
- Prepay- if the payment should be added as a prepay deposit to the family's ledger



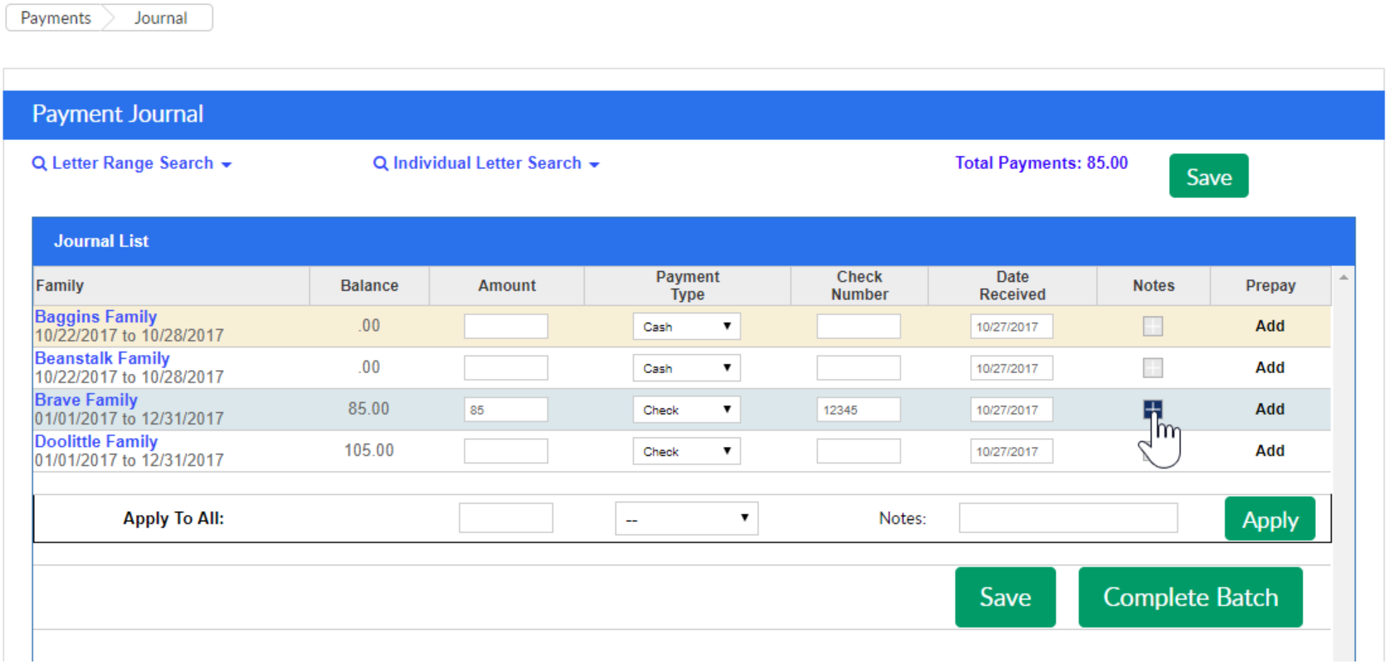
Total Payments: 0.00

Journal List

Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	85.00		Cash		10/27/2017	☐	Add
Doolittle Family 01/01/2017 to 12/31/2017	105.00		Cash		10/27/2017	☐	Add

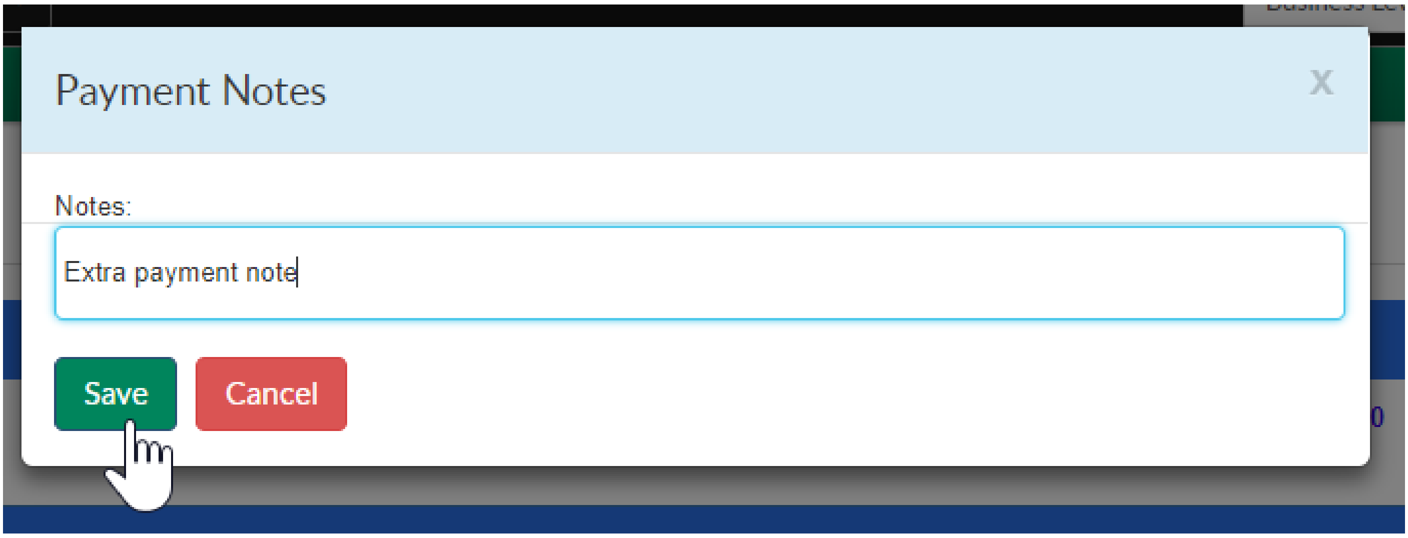
Apply To All: -- Notes:

To add a note to a payment click the plus button.



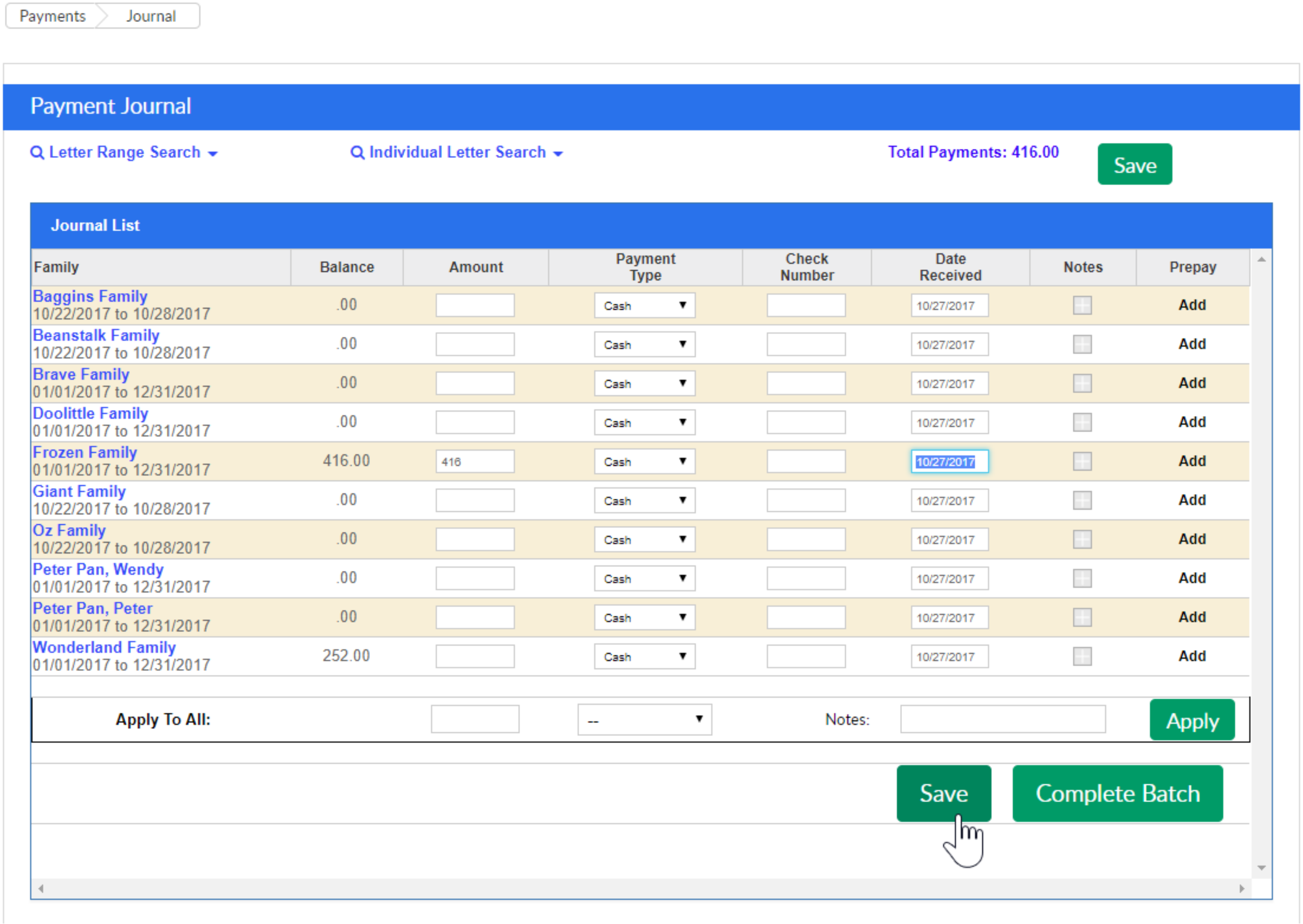
Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	85.00	85	Check	12345	10/27/2017	■	Add
Doolittle Family 01/01/2017 to 12/31/2017	105.00		Check		10/27/2017	☐	Add

Enter the text of your payment note, then press save.



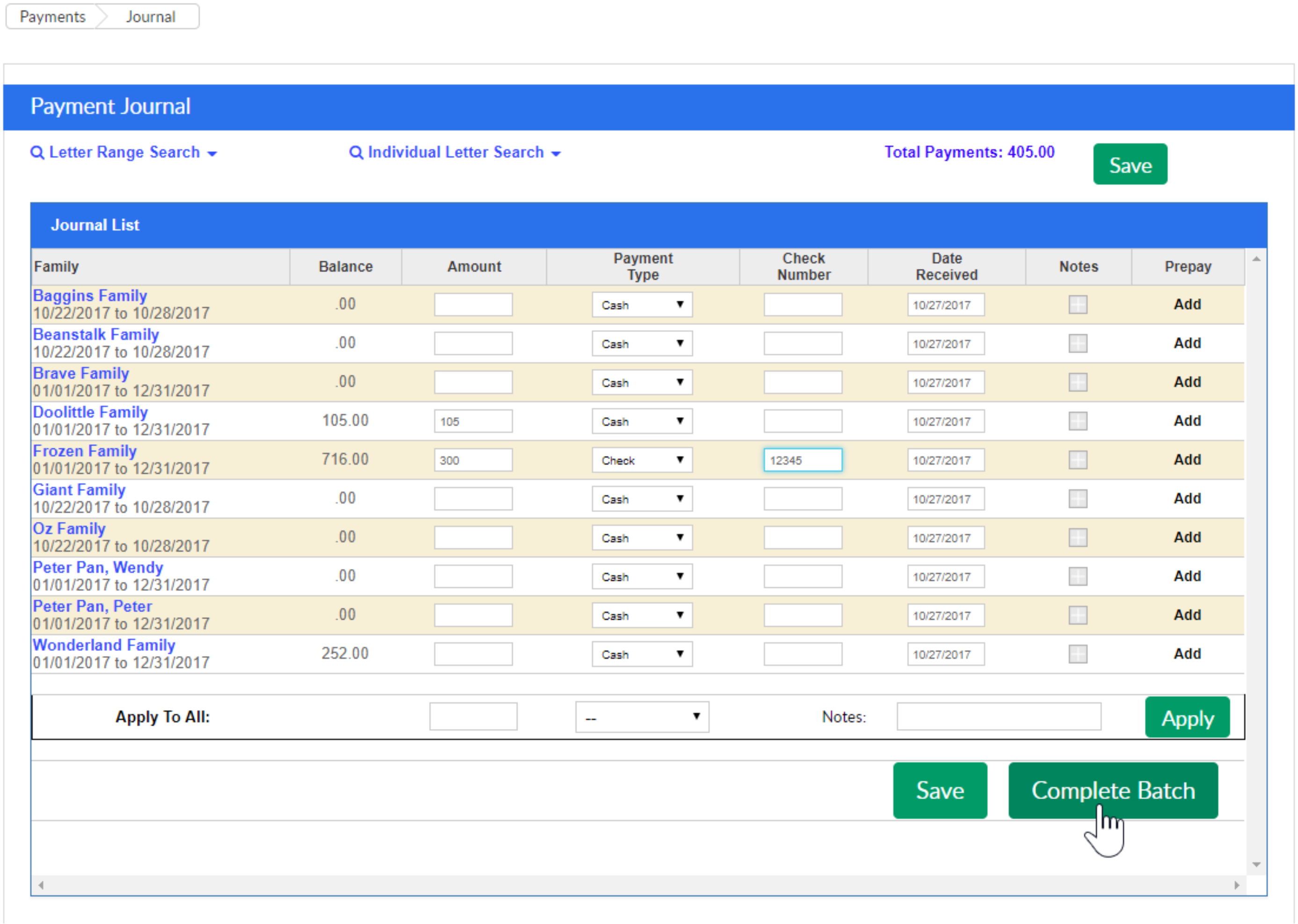
Notes: Extra payment note

If a user navigates away from a letter grouping before pressing save or completing the batch the entered payment will not save. If you press save, the payment will post. The total of the payments being receipted will always display at the top of the page next to the save button.



Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Doolittle Family 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Frozen Family 01/01/2017 to 12/31/2017	416.00	416	Cash		10/27/2017	☐	Add
Giant Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Oz Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Wendy 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Peter 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Wonderland Family 01/01/2017 to 12/31/2017	252.00		Cash		10/27/2017	☐	Add

Apply To All: -- Notes: Apply



Total Payments: 405.00

Family	Balance	Amount	Payment Type	Check Number	Date Received	Notes	Prepay
Baggins Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Beanstalk Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Brave Family 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Doolittle Family 01/01/2017 to 12/31/2017	105.00	105	Cash		10/27/2017	☐	Add
Frozen Family 01/01/2017 to 12/31/2017	716.00	300	Check	12345	10/27/2017	☐	Add
Giant Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Oz Family 10/22/2017 to 10/28/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Wendy 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Peter Pan, Peter 01/01/2017 to 12/31/2017	.00		Cash		10/27/2017	☐	Add
Wonderland Family 01/01/2017 to 12/31/2017	252.00		Cash		10/27/2017	☐	Add

Apply To All: -- Notes:

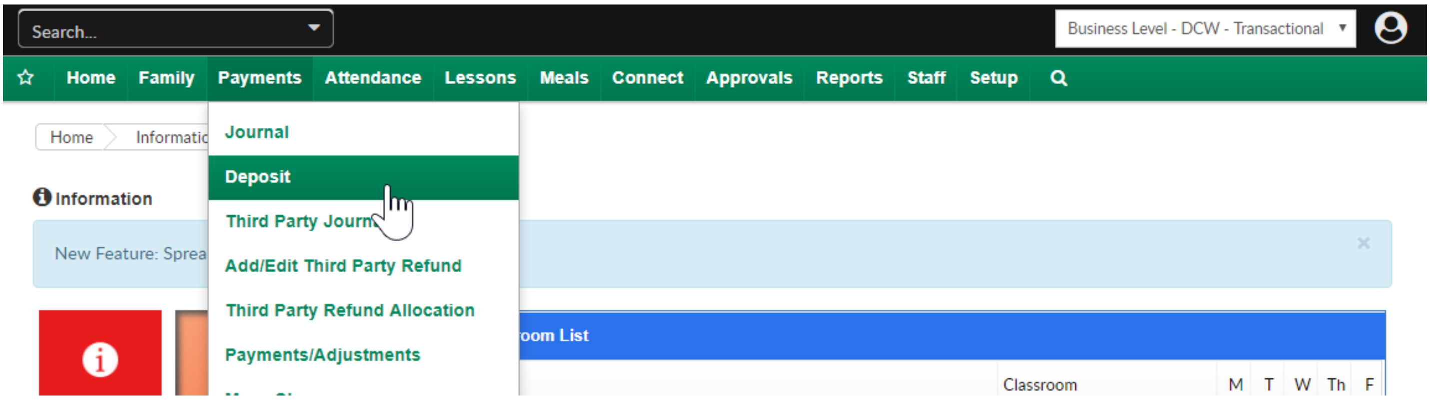
Once Complete Batch is selected, the screen will direct the user to the Batch and Report screen. On the Batch and Report screen, users can group payments together that are going to be or have been deposited to the bank in the same batch.

Payments > Deposit

Last Modified on 03/14/2018 9:22 am EDT

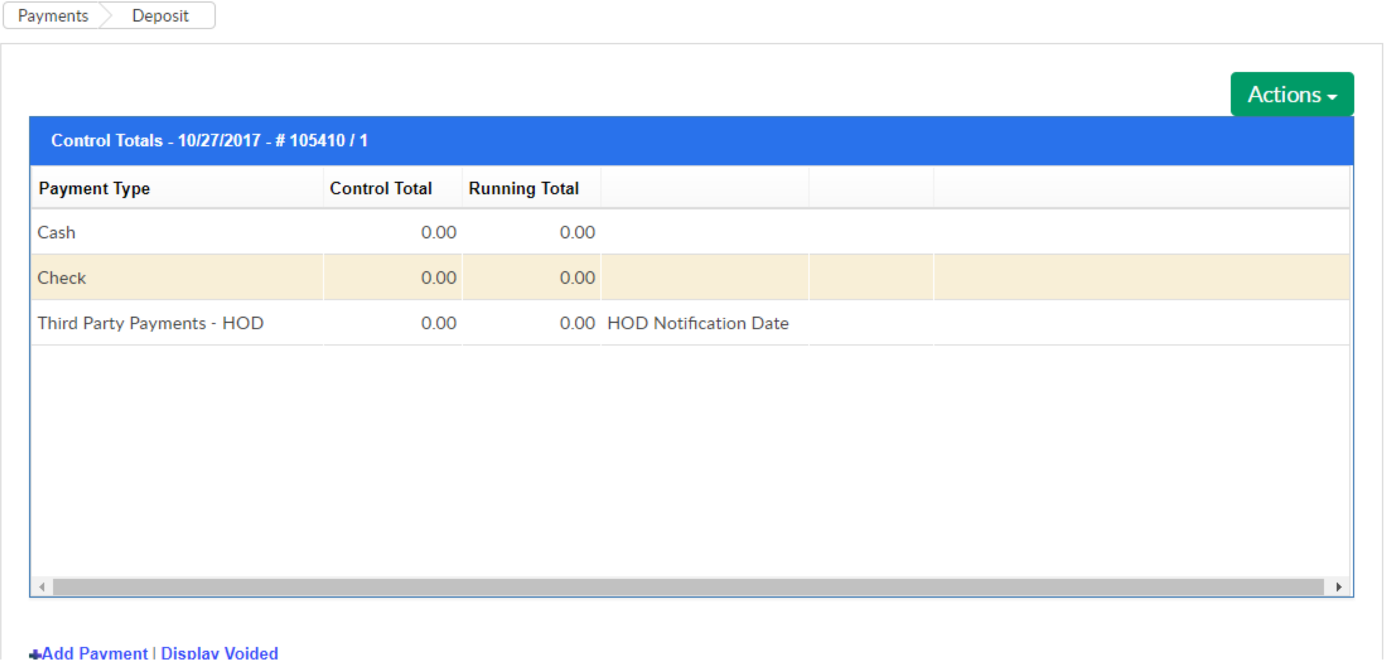
The Payments > Deposit screen lets users receipt payments in batch format.

From the Payments menu, select the deposit option.



On the Payments > Deposit screen type-payment valid values will display that have been enabled to allow deposit.

Note: If another payment type should display in this section go to setup > system config, valid values- select the edit icon next to the type-payment that should display and change the Allow Deposit setting to Yes.



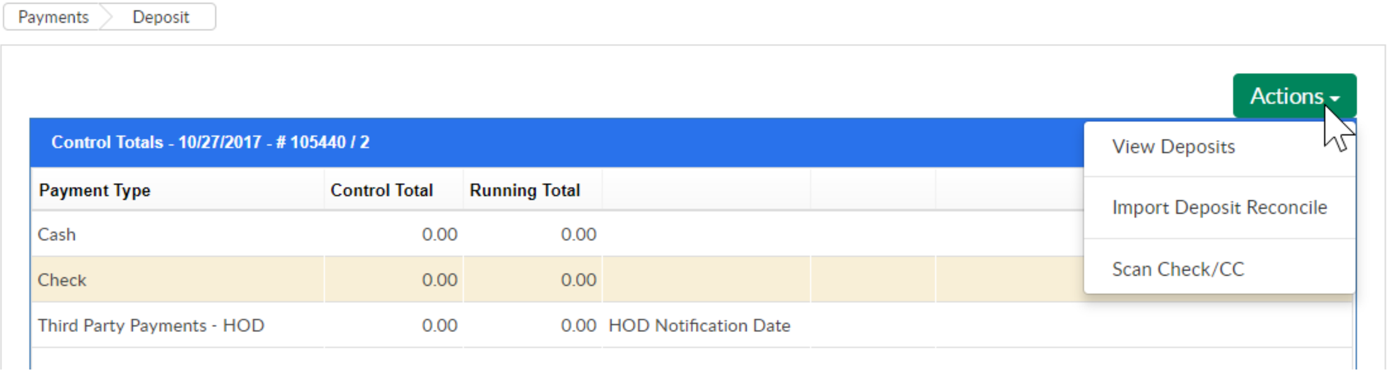
Control Totals - 10/27/2017 - # 105410 / 1

Payment Type	Control Total	Running Total		
Cash	0.00	0.00		
Check	0.00	0.00		
Third Party Payments - HOD	0.00	0.00	HOD Notification Date	

+Add Payment | Display Voided

Select the Actions menu to-

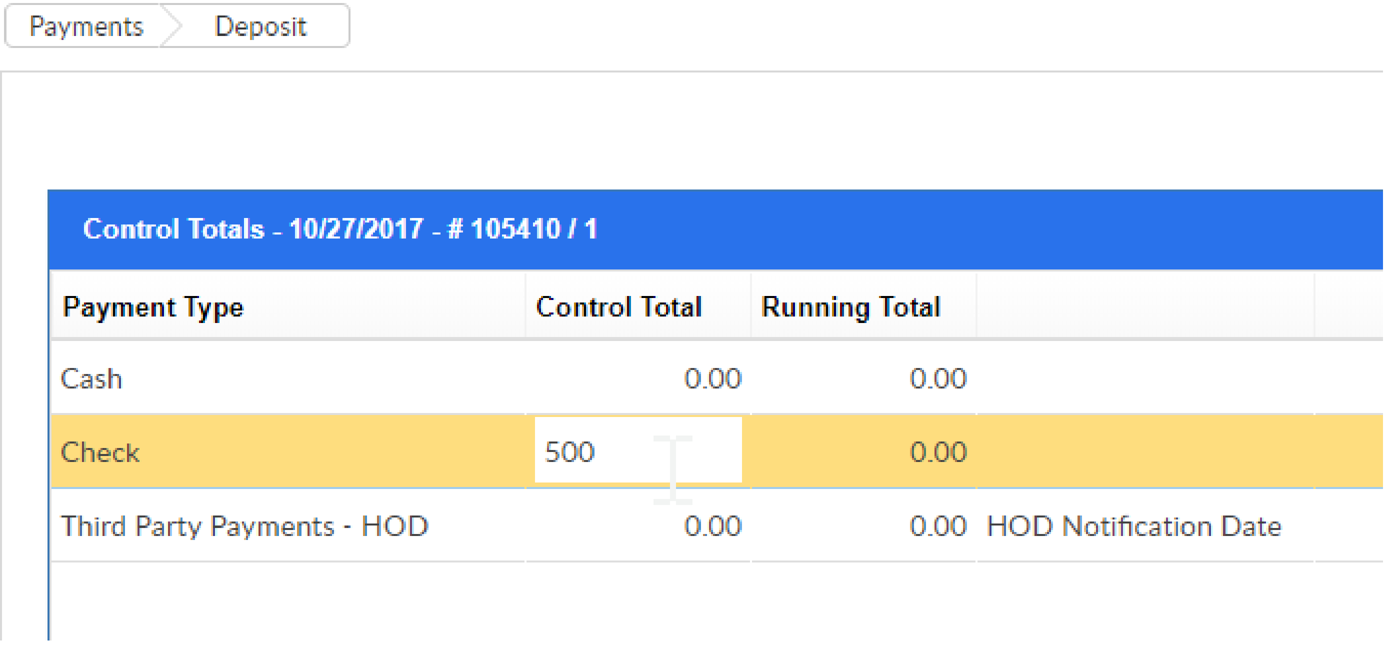
- View Deposits- allows users to see which deposits have been added, by who and for how much
- Import Deposit Reconcile- an integration that can be setup to reconcile deposits
- Scan Check/CC- an integration that can be setup to allow for remote deposit of checks and scanning of credit card payments



Control Totals - 10/27/2017 - # 105440 / 2

Payment Type	Control Total	Running Total	
Cash	0.00	0.00	
Check	0.00	0.00	
Third Party Payments - HOD	0.00	0.00	HOD Notification Date

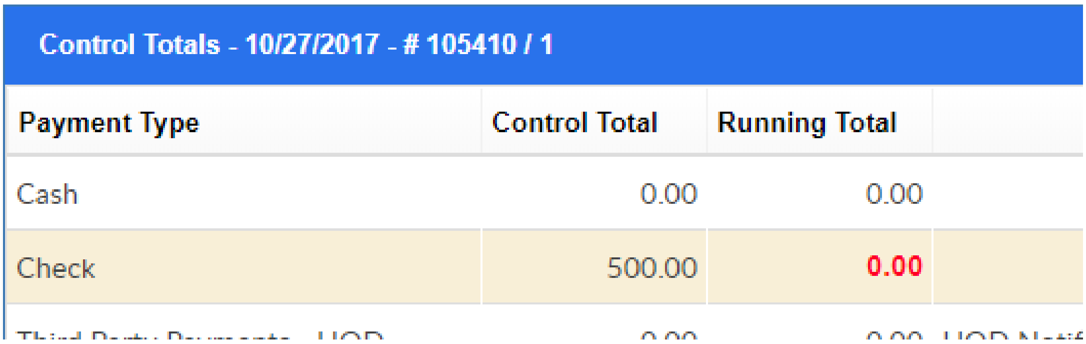
To begin the deposit process, double click into the control total field, this will allow the user to edit the control total amount. The control total should be the total amount for the payment type of the payments that will be receipted. Press enter or tab once the amount has been entered.



Control Totals - 10/27/2017 - # 105410 / 1

Payment Type	Control Total	Running Total	
Cash	0.00	0.00	
Check	500	0.00	
Third Party Payments - HOD	0.00	0.00	HOD Notification Date

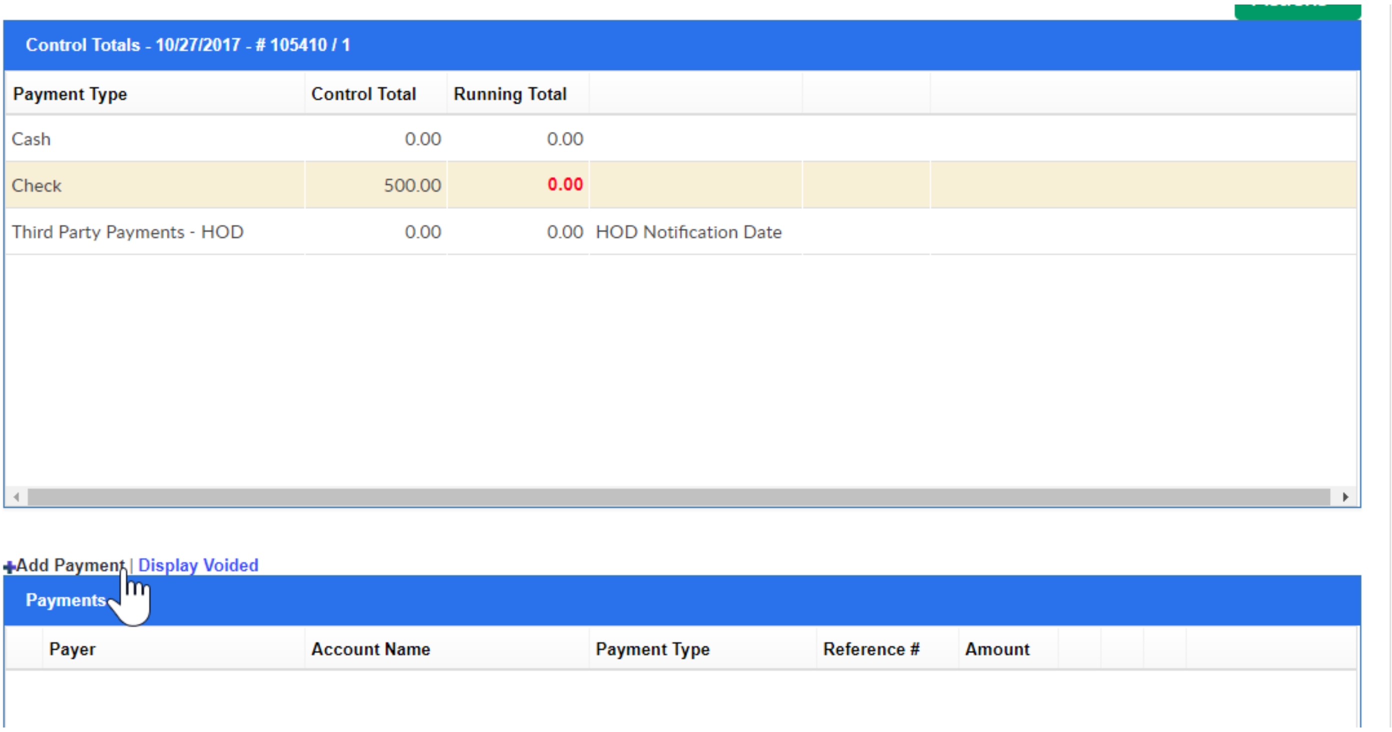
Note- the running total now displays as a red zero. This means that no payments have been receipted towards the control total. As payments are entered the running total will update, once the control total is green, the batch can be posted. If the control total and running total do not match the batch cannot be posted.



Control Totals - 10/27/2017 - # 105410 / 1

Payment Type	Control Total	Running Total
Cash	0.00	0.00
Check	500.00	0.00

To add a payment, select the +Add Payment link above the payment box.



Control Totals - 10/27/2017 - # 105410 / 1

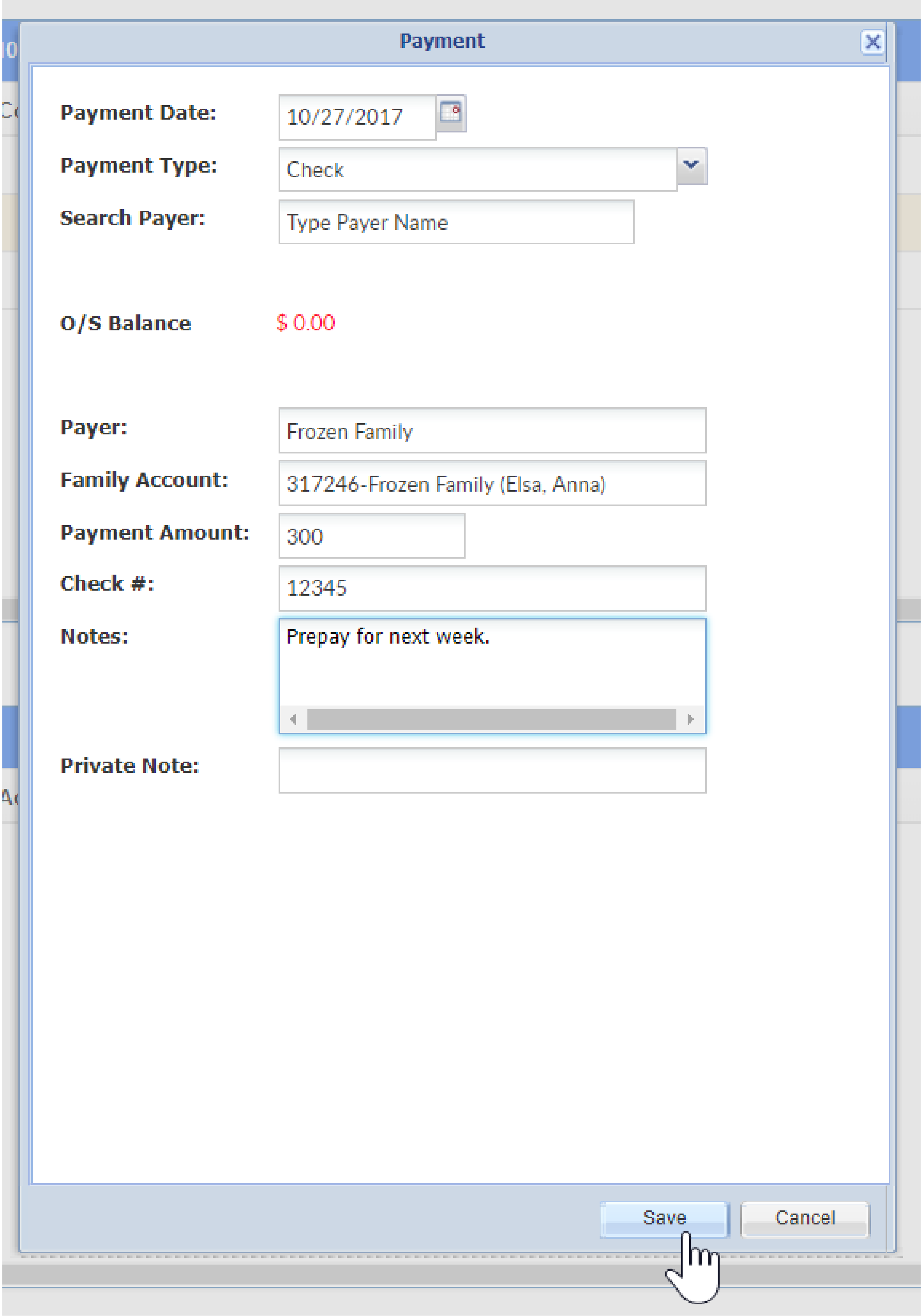
Payment Type	Control Total	Running Total	
Cash	0.00	0.00	
Check	500.00	0.00	
Third Party Payments - HOD	0.00	0.00	HOD Notification Date

Payments

Payer	Account Name	Payment Type	Reference #	Amount

Enter the payment detail into the payment box and then press Save. In the Search Payer box, begin typing the family's last name or the parent's last name, results will display- select the correct family. Once the family has been selected, their current outstanding balance will display in red.

Notes will display to families on their statements, Private Notes will only display internally.



Payment Date: 10/27/2017

Payment Type: Check

Search Payer: Type Payer Name

O/S Balance $ 0.00

Payer: Frozen Family

Family Account: 317246-Frozen Family (Elsa, Anna)

Payment Amount: 300

Check #: 12345

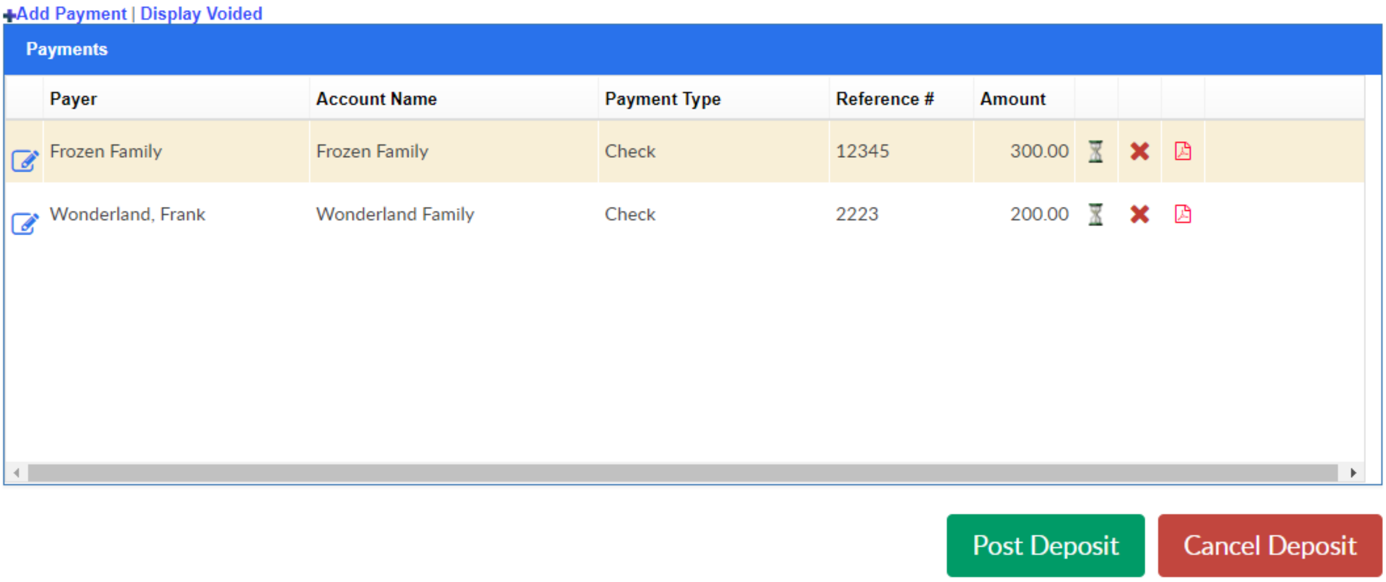
Notes: Prepay for next week.

Private Note:

Once save has been selected a blank payment box will open so that the next payment can be receipted. Once all receipting is complete press Cancel or select the x at the top right of the payment box to close out.

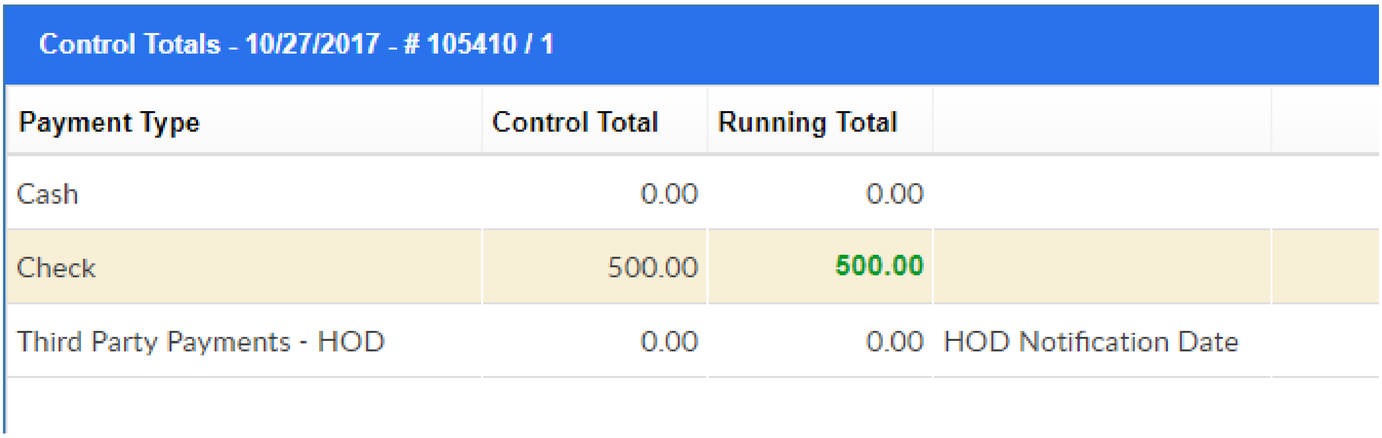
Once payments have been added to the deposit, they will display in the payment box. Select the edit icon to the left of the payer name if the payment needs to be edited, this will bring up the payment screen so changes or adjustments can be made as needed.

- The timer icon on the left side means the payment is pending.
- Select the red x to delete the payment from the batch.
- Select the PDF icon to pull a receipt for the payment.



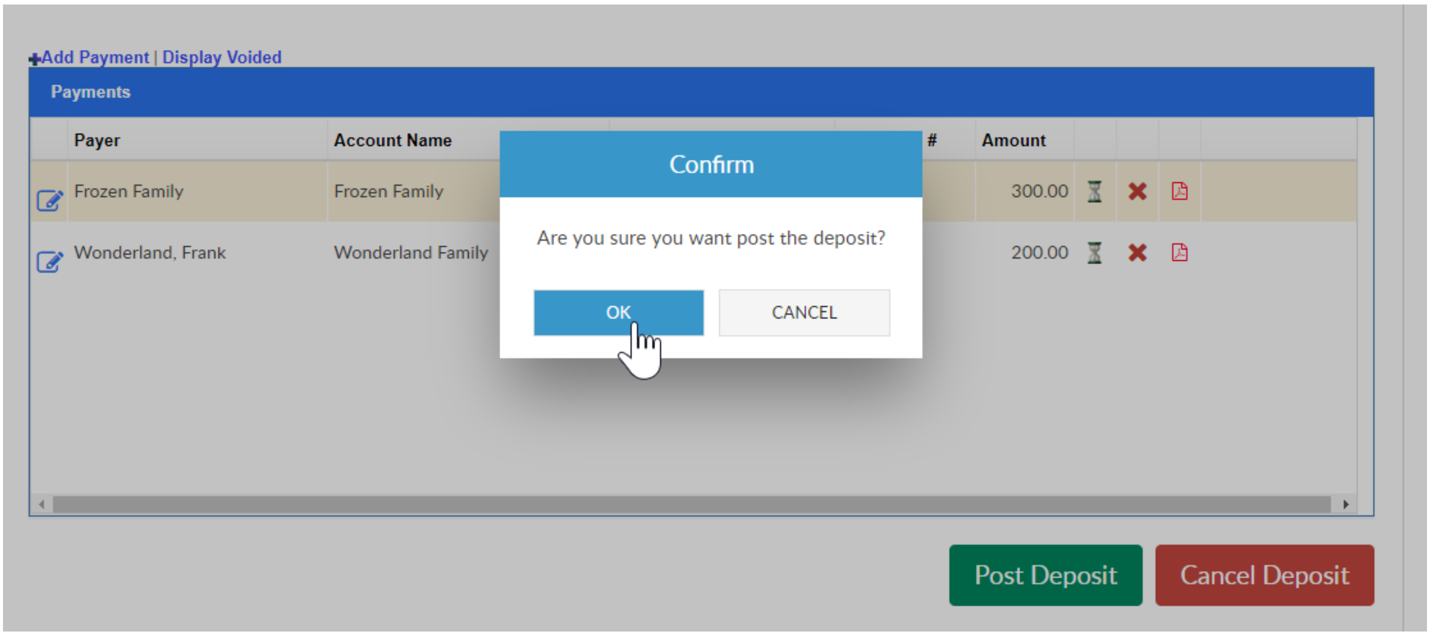
	Payer	Account Name	Payment Type	Reference #	Amount			
✎	Frozen Family	Frozen Family	Check	12345	300.00	⏳	✖	📄
✎	Wonderland, Frank	Wonderland Family	Check	2223	200.00	⏳	✖	📄

Once all payments have been entered, the control total and running total should match-


Control Totals - 10/27/2017 - # 105410 / 1

Payment Type	Control Total	Running Total	
Cash	0.00	0.00	
Check	500.00	500.00	
Third Party Payments - HOD	0.00	0.00	HOD Notification Date

When ready, select the Post Deposit button to post the payments to family financial ledgers. A confirmation box will appear, press OK to complete posting.

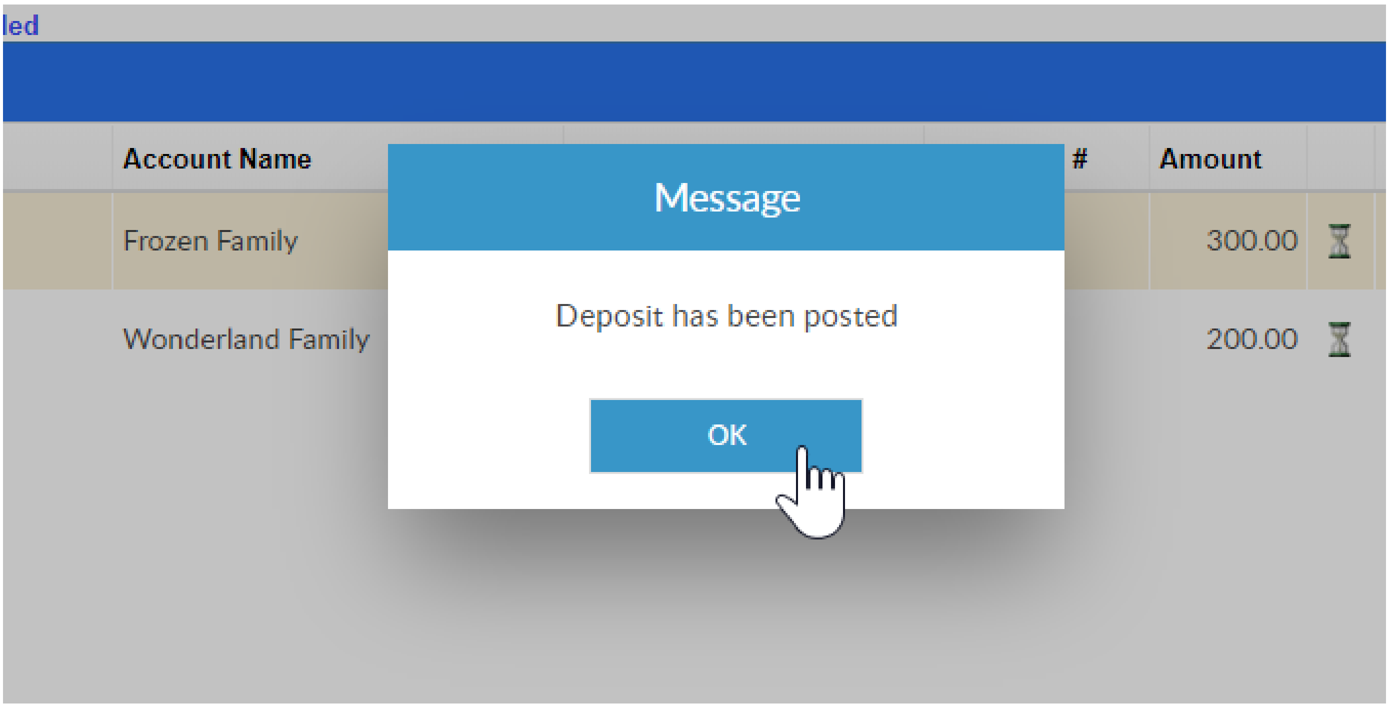


Payer	Account Name	#	Amount
Frozen Family	Frozen Family		300.00
Wonderland, Frank	Wonderland Family		200.00

Confirm

Are you sure you want post the deposit?

A message will display when posting has been completed, press OK to continue.



Account Name	#	Amount
Frozen Family		300.00
Wonderland Family		200.00

Message

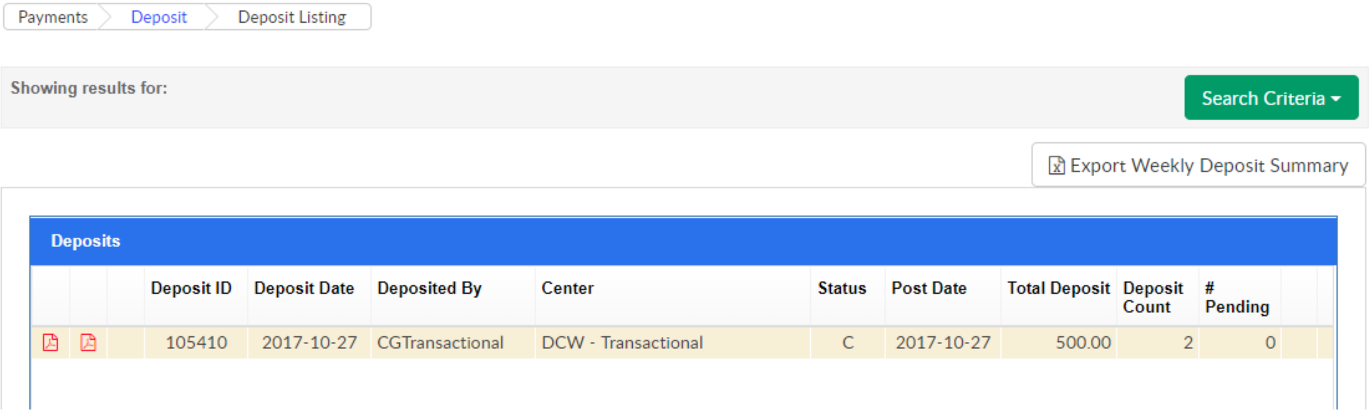
Deposit has been posted

Once the page refreshes, the deposit listing page will display. The below fields will display on the Deposits screen-

- Select the red PDF icons to pull a batch summary for each batch deposit line
- Deposit ID- system assigned
- Deposit Date- date the deposit was completed
- Deposited By- which user added the deposit
- Center- which site or school the deposit was receipted to
- Status- is the deposit P- pending or C- completed

- Post Date- date the deposit was posted as of
- Total Deposit- total amount of the payments
- Deposit Count- how many payments were receipted
- # Pending- the number of payments that have not been posted yet

Press the Export Weekly Deposit Summary option to pull an excel file displaying the information displayed in the deposit section.

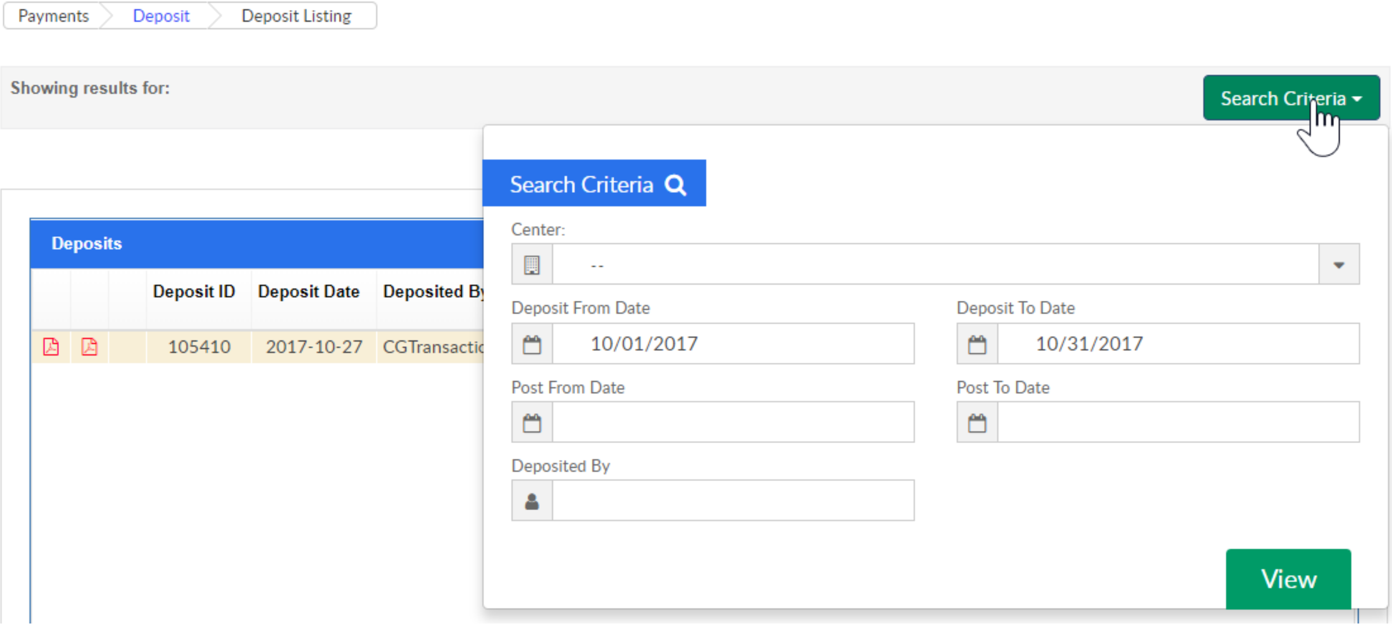


Deposits

			Deposit ID	Deposit Date	Deposited By	Center	Status	Post Date	Total Deposit	Deposit Count	# Pending
			105410	2017-10-27	CGTransactional	DCW - Transactional	C	2017-10-27	500.00	2	0

To change the deposits displayed in the deposit section, select the Search Criteria button, enter as much or as little criteria as desired, then press View.

- Center- which center was the deposit receipted to?
- Deposit From Date- beginning date to pull deposits
- Deposit To Date- end date to pull deposits
- Post From Date-beginning date to pull deposits
- Post To Date- end date to pull deposits
- Deposited By- to see by user



			Deposit ID	Deposit Date	Deposited By
			105410	2017-10-27	CGTransacti

Search Criteria

Center: --

Deposit From Date 10/01/2017

Deposit To Date 10/31/2017

Post From Date

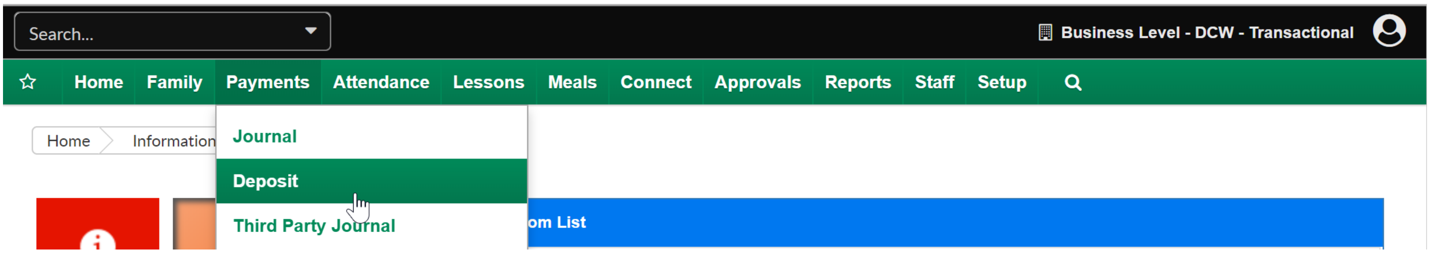
Post To Date

Deposited By

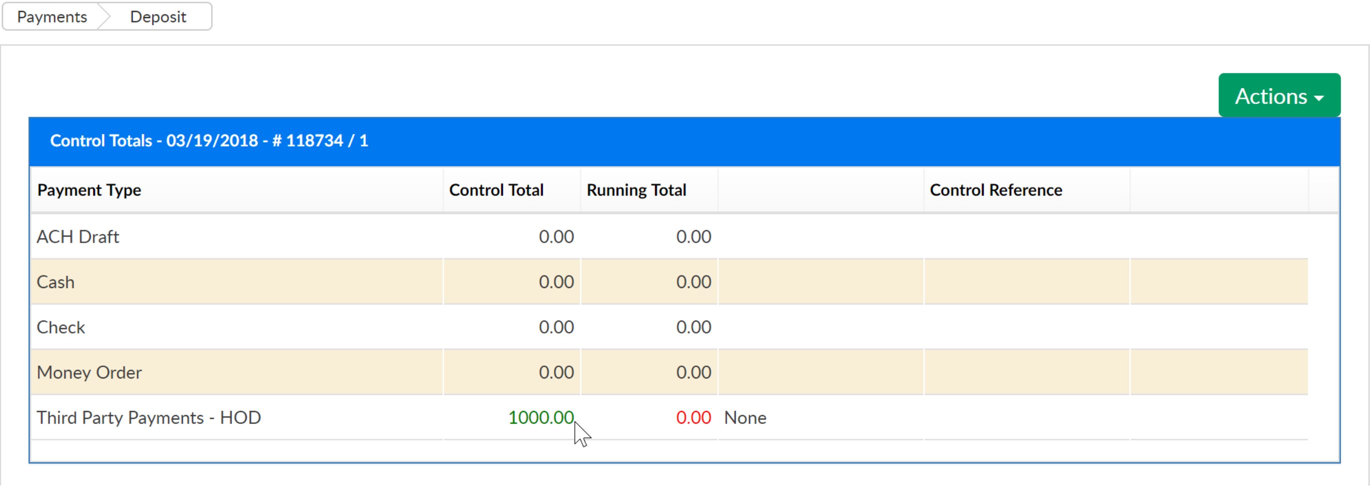
Payments > Third Party Journal

Last Modified on 03/19/2018 1:14 pm EDT

To receipt payments received from a third party, first go to the payments > deposit screen and receipt the payment as a Third Party- HOD payment.



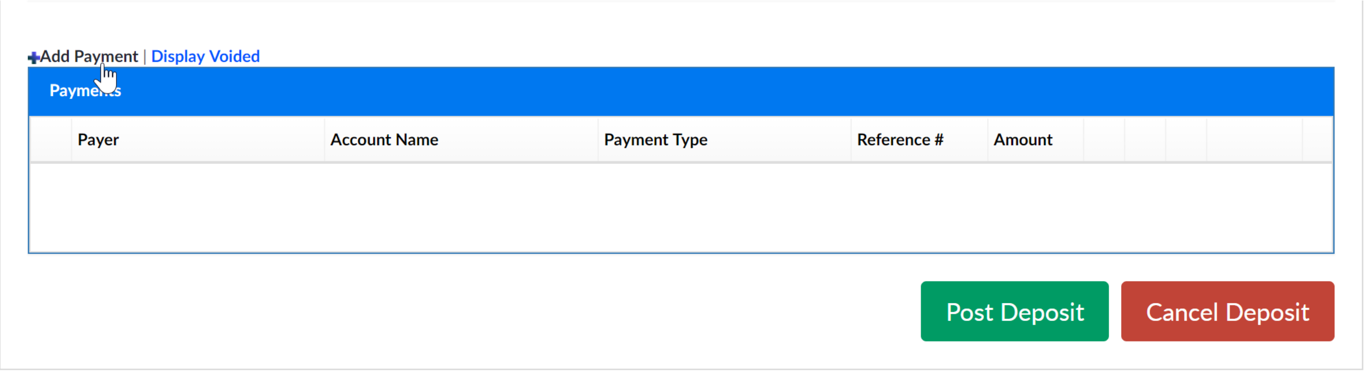
Double click into the Control Total column field by Third Party Payments - HOD and enter the amount of the payment you will be receipting.



Control Totals - 03/19/2018 - # 118734 / 1

Payment Type	Control Total	Running Total		Control Reference
ACH Draft	0.00	0.00		
Cash	0.00	0.00		
Check	0.00	0.00		
Money Order	0.00	0.00		
Third Party Payments - HOD	1000.00	0.00	None	

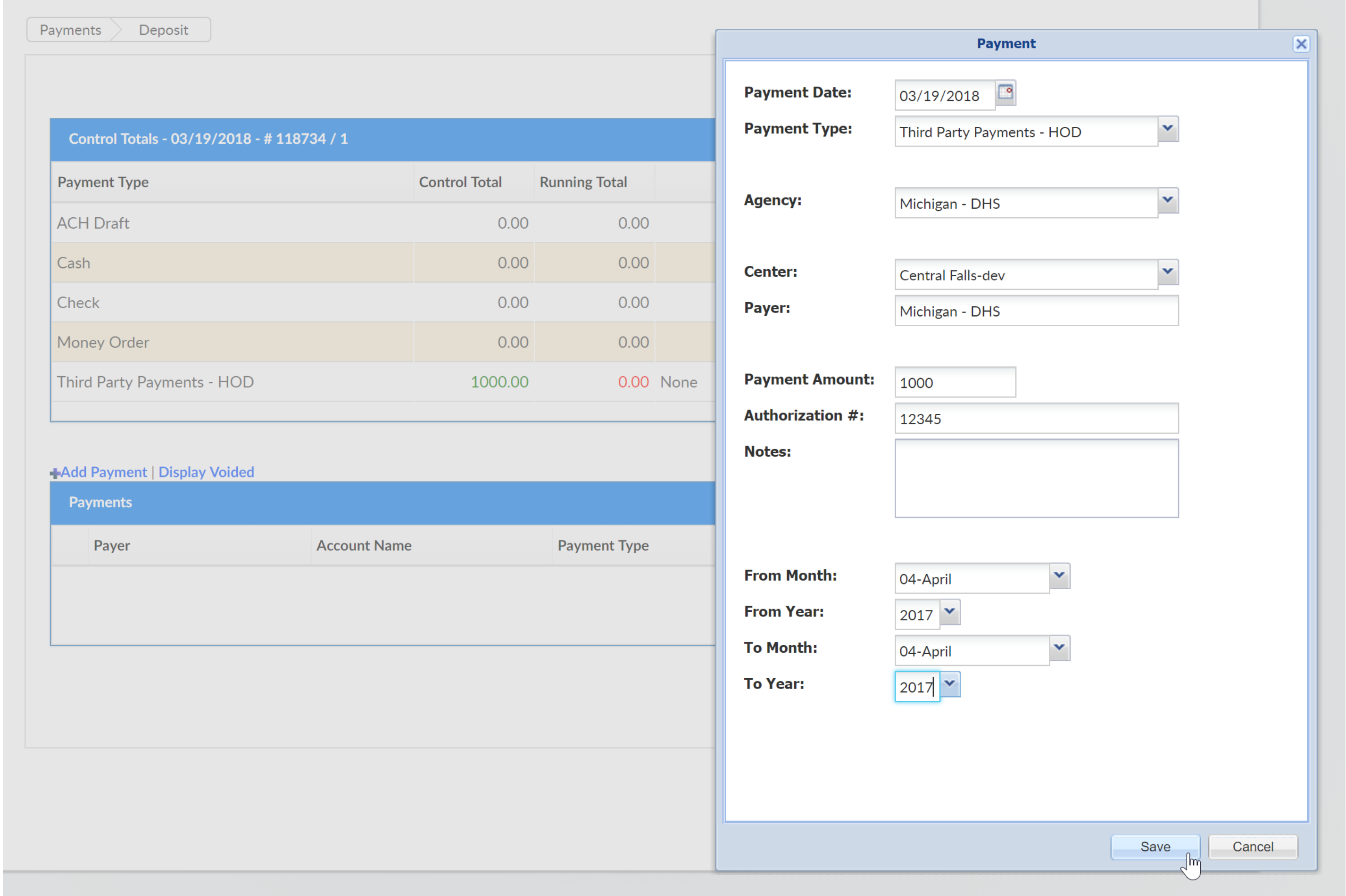
Then select Add Payment-



Payments

Payer	Account Name	Payment Type	Reference #	Amount

Enter the payment date, the payment type, select the agency, center, enter the payment amount, the authorization (check number) and any notes about the payment. Then select the service dates the payment is being allocated towards and press Save.



Control Totals - 03/19/2018 - # 118734 / 1

Payment Type	Control Total	Running Total	
ACH Draft	0.00	0.00	
Cash	0.00	0.00	
Check	0.00	0.00	
Money Order	0.00	0.00	
Third Party Payments - HOD	1000.00	0.00	None

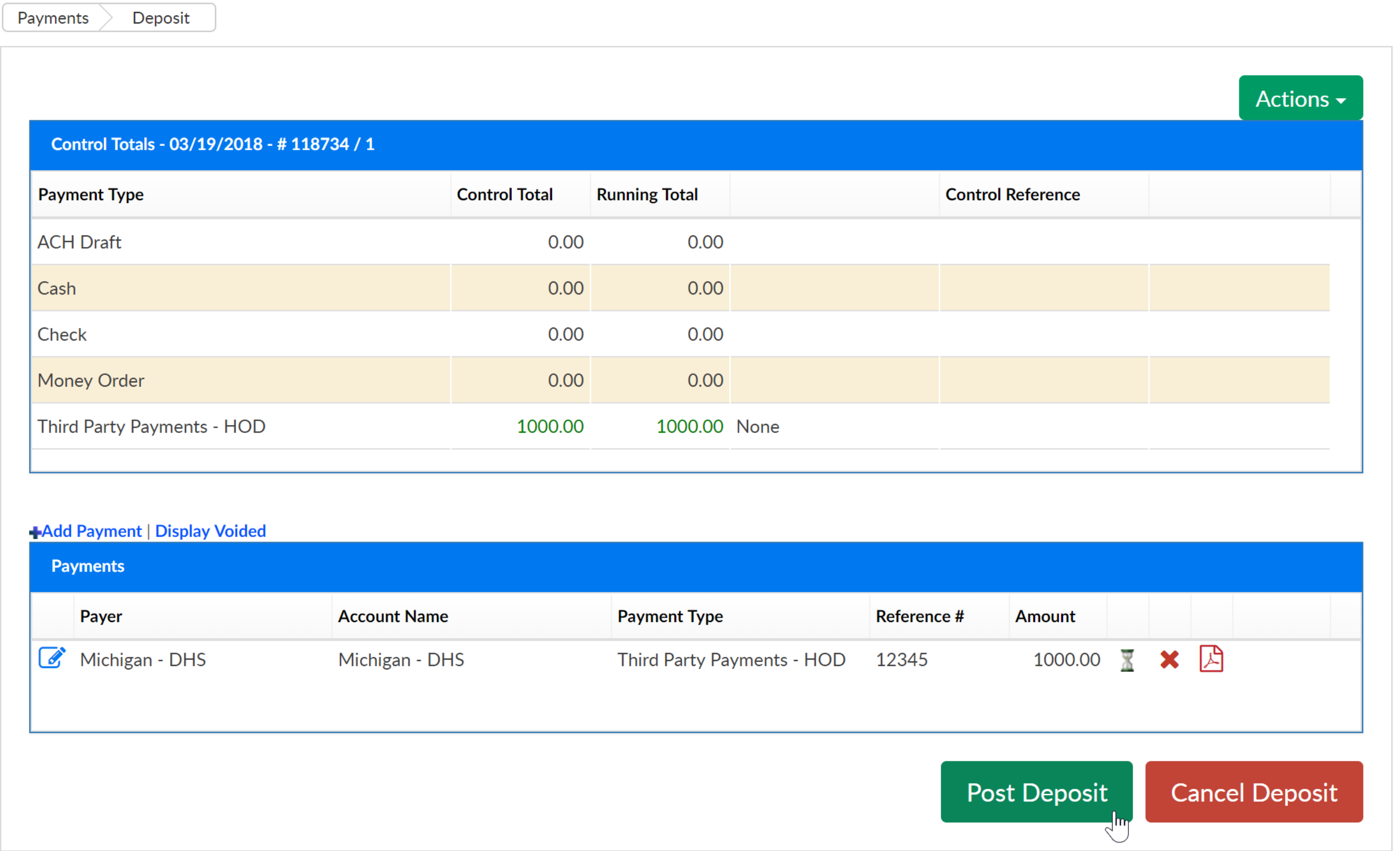
Payments

Payer	Account Name	Payment Type

Payment

Payment Date: 03/19/2018
Payment Type: Third Party Payments - HOD
Agency: Michigan - DHS
Center: Central Falls-dev
Payer: Michigan - DHS
Payment Amount: 1000
Authorization #: 12345
Notes:
From Month: 04-April
From Year: 2017
To Month: 04-April
To Year: 2017

Once your control total and running total are in balance select the option to Post Deposit.



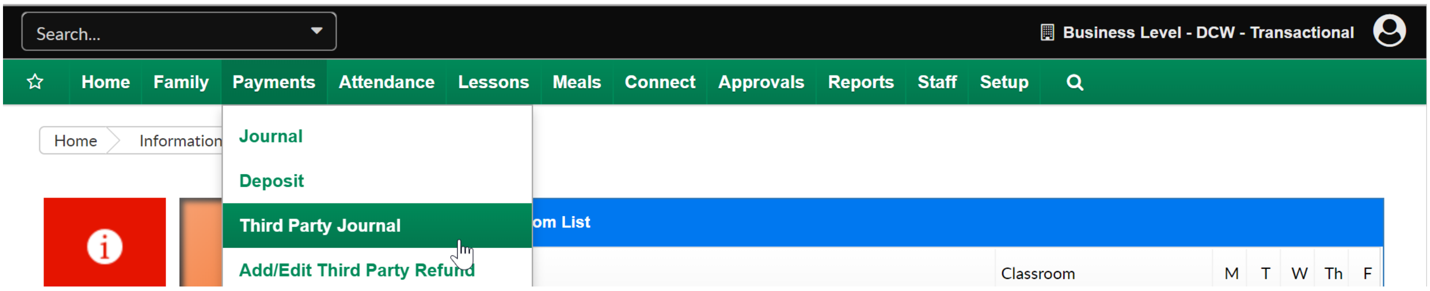
Control Totals - 03/19/2018 - # 118734 / 1

Payment Type	Control Total	Running Total		Control Reference	
ACH Draft	0.00	0.00			
Cash	0.00	0.00			
Check	0.00	0.00			
Money Order	0.00	0.00			
Third Party Payments - HOD	1000.00	1000.00	None		

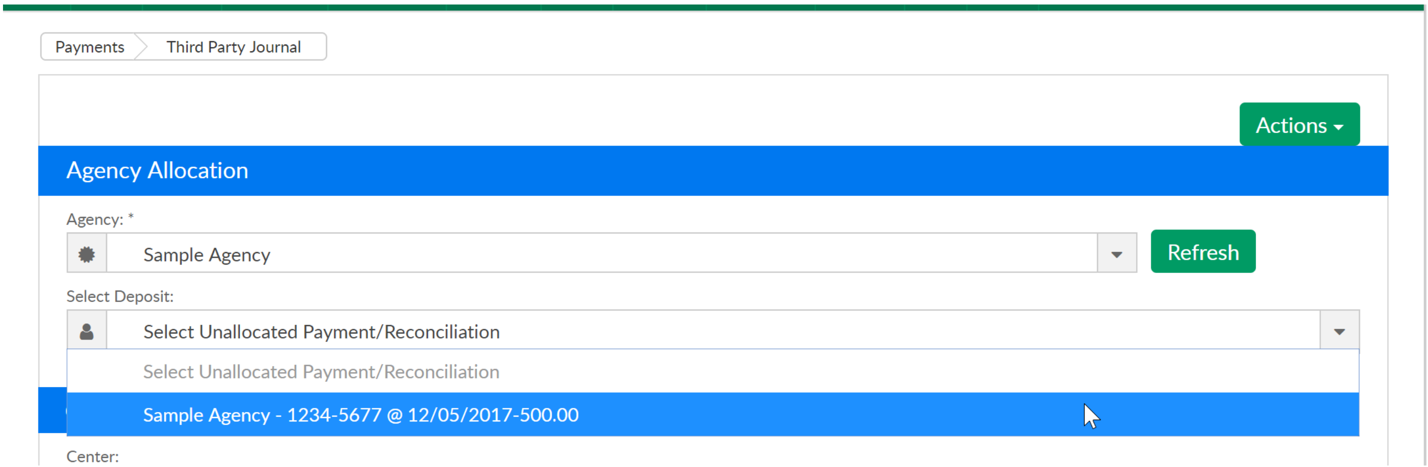
Payments

Payer	Account Name	Payment Type	Reference #	Amount
Michigan - DHS	Michigan - DHS	Third Party Payments - HOD	12345	1000.00

Once the payment has been posted go to payments > third party journal to create specific allocations for individual student ledgers by third party/sponsor.



On the third party journal screen select the agency's payment that is being reconciled. Once agency is selected, then select a deposit from the Select Deposit field.

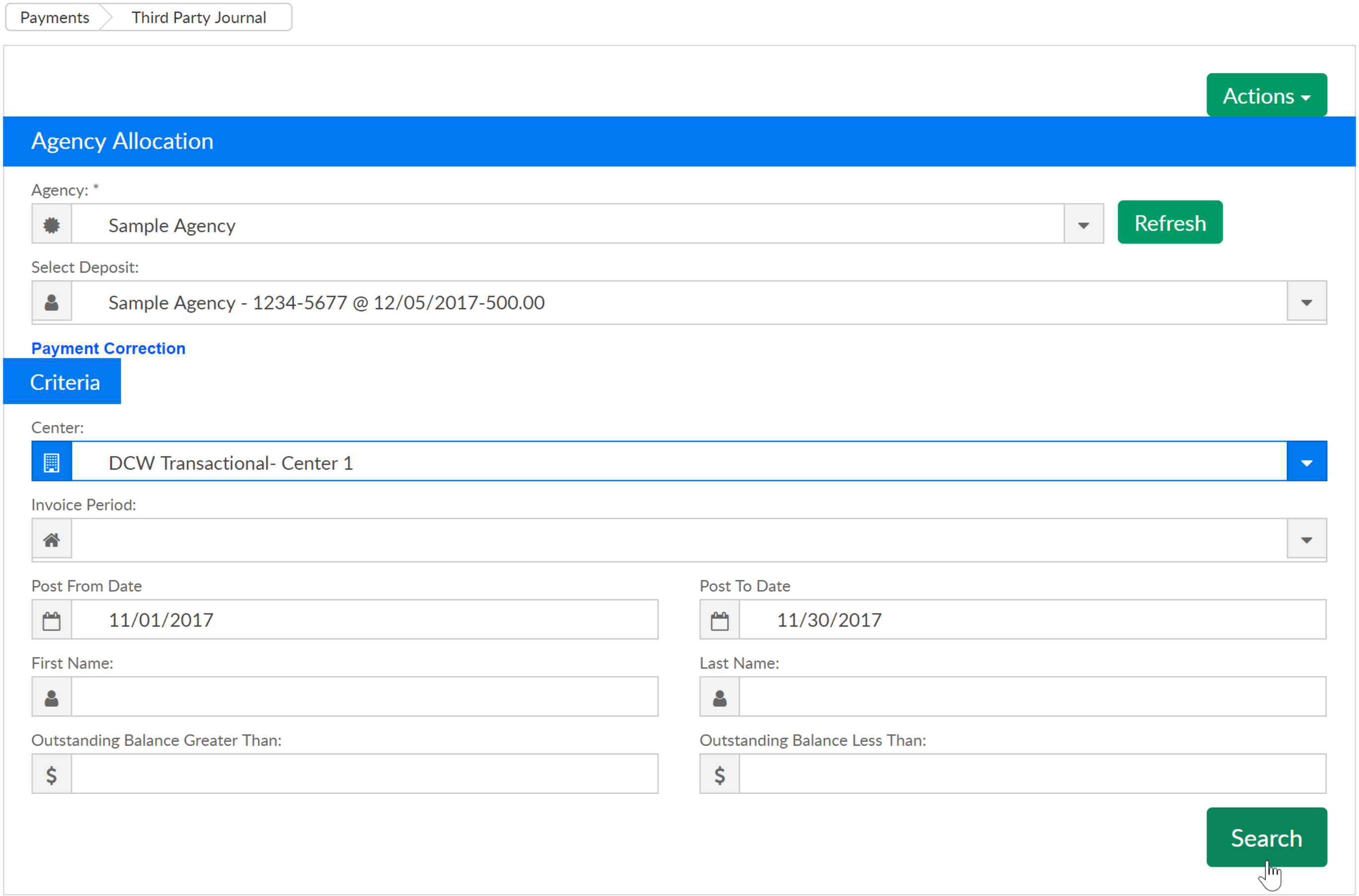


Agency: * Sample Agency

Select Deposit: Select Unallocated Payment/Reconciliation

Sample Agency - 1234-5677 @ 12/05/2017-500.00

Criteria information in the area below will all the user to select a specific center and date range the payment is being towards. Once criteria has been entered, press Search to display children with balances for the selected agency.



Agency Allocation

Agency: * Sample Agency

Select Deposit: Sample Agency - 1234-5677 @ 12/05/2017-500.00

Payment Correction

Criteria

Center: DCW Transactional- Center 1

Invoice Period:

Post From Date: 11/01/2017

Post To Date: 11/30/2017

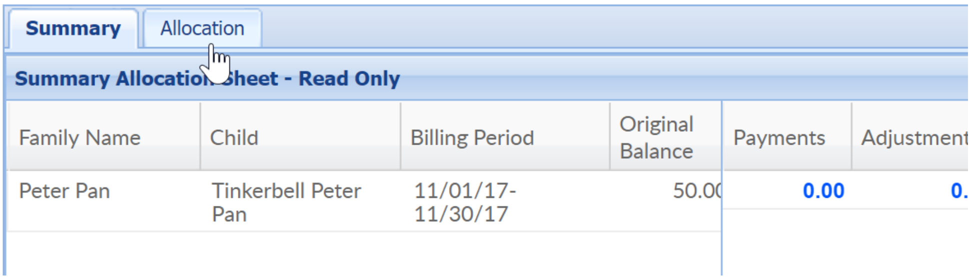
First Name:

Last Name:

Outstanding Balance Greater Than: $

Outstanding Balance Less Than: $

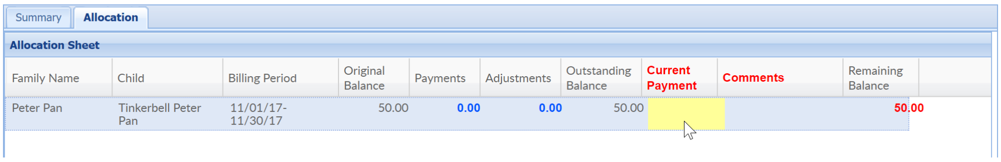
The first tab that displays in this area is the Summary tab, this is where you can see outstanding balances that met search criteria. Select the Allocation tab to apply your payment to specific children.



Summary Allocation Sheet - Read Only

Family Name	Child	Billing Period	Original Balance	Payments	Adjustment
Peter Pan	Tinkerbell Peter Pan	11/01/17-11/30/17	50.0	0.00	0.

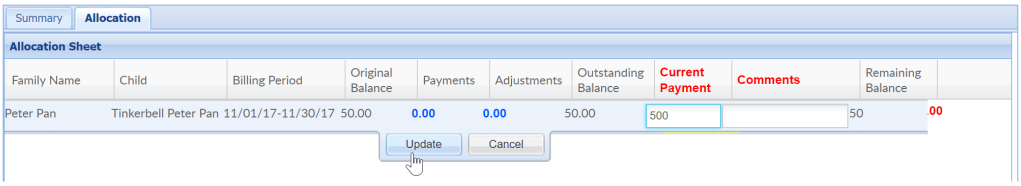
On the Allocation tab, double click to add the payment in the current payment column.



Allocation Sheet

Family Name	Child	Billing Period	Original Balance	Payments	Adjustments	Outstanding Balance	Current Payment	Comments	Remaining Balance
Peter Pan	Tinkerbell Peter Pan	11/01/17-11/30/17	50.00	0.00	0.00	50.00			50.00

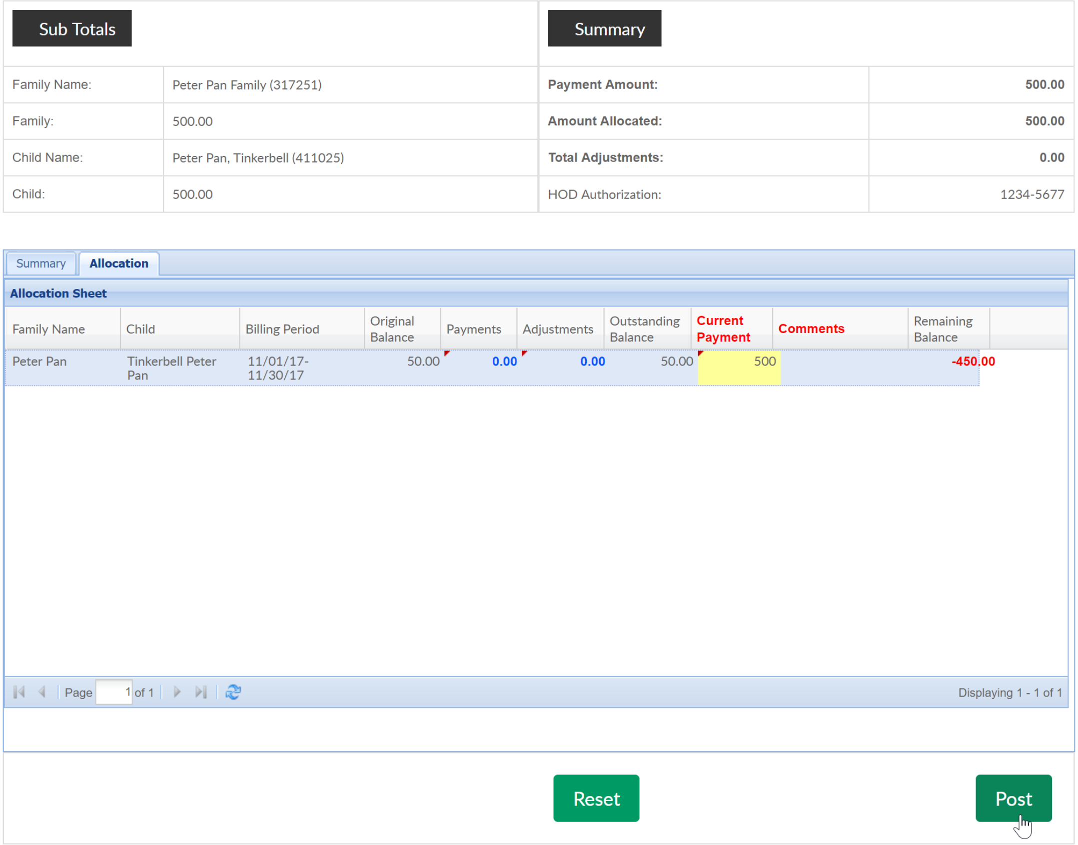
Add the payment amount for the first child on the payment's remittance, then press update. Continue this process until the payment has been fully allocated.



Allocation Sheet

Family Name	Child	Billing Period	Original Balance	Payments	Adjustments	Outstanding Balance	Current Payment	Comments	Remaining Balance	
Peter Pan	Tinkerbell Peter Pan	11/01/17-11/30/17	50.00	0.00	0.00	50.00	500		50	.00

Once the payment total and amount allocated match the payment can be posted. Don't worry about over/under payments- those can be reconciled in the next step. Press the post button to post the payment.



Sub Totals

Family Name:	Peter Pan Family (317251)
Family:	500.00
Child Name:	Peter Pan, Tinkerbell (411025)
Child:	500.00

Summary

Payment Amount:	**500.00**
Amount Allocated:	**500.00**
Total Adjustments:	**0.00**
HOD Authorization:	1234-5677

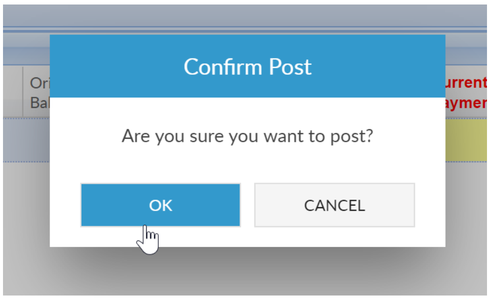
Allocation Sheet

Family Name	Child	Billing Period	Original Balance	Payments	Adjustments	Outstanding Balance	Current Payment	Comments	Remaining Balance
Peter Pan	Tinkerbell Peter Pan	11/01/17-11/30/17	50.00	0.00	0.00	50.00	500		-450.00

Page 1 of 1

Displaying 1 - 1 of 1

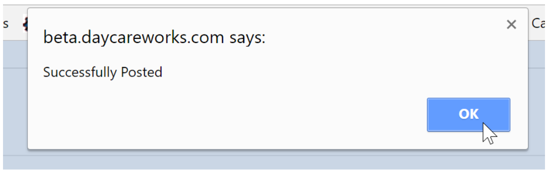
Select OK to confirm posting.



Confirm Post

Are you sure you want to post?

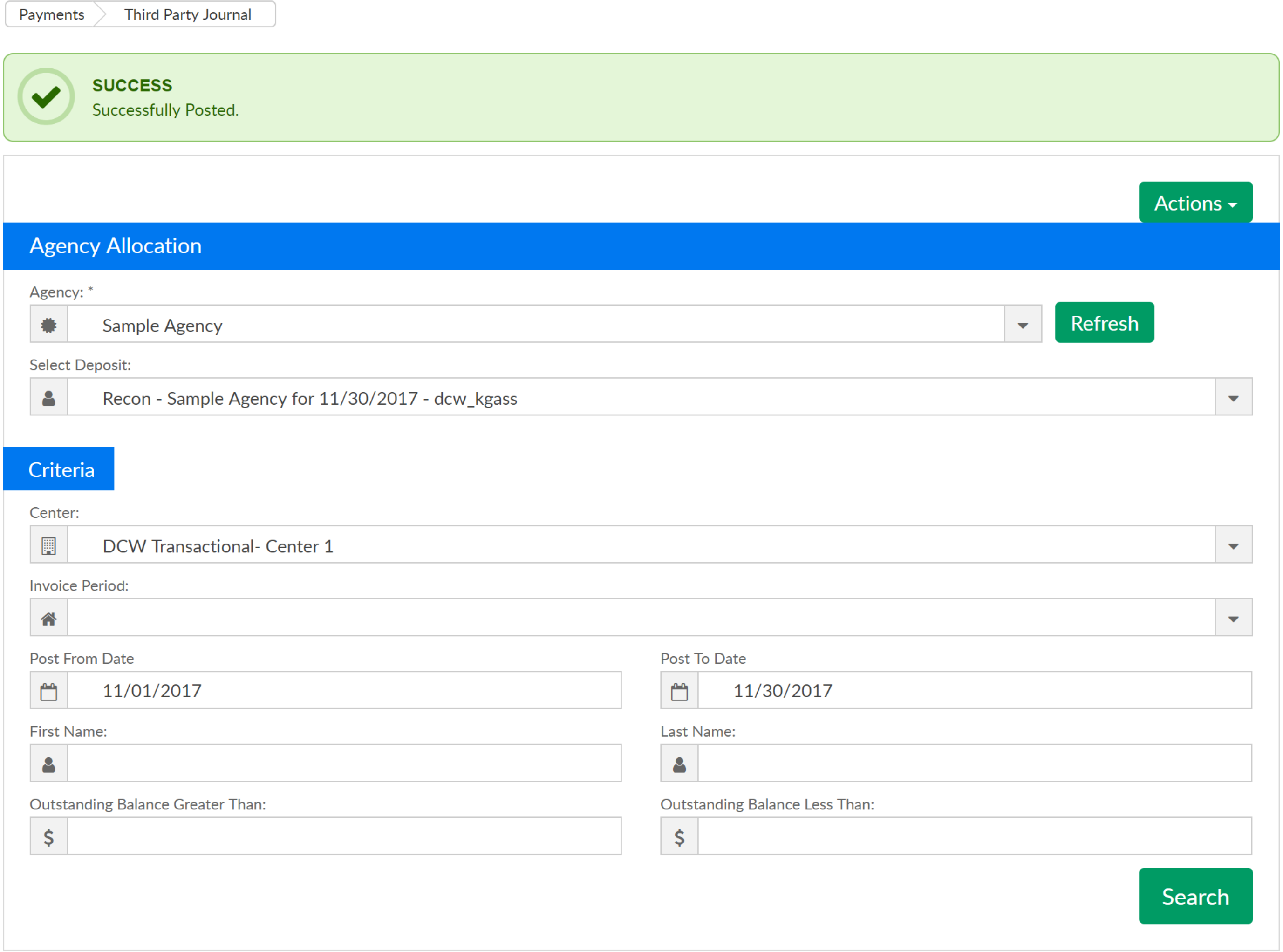
A confirmation box will display when posting is complete, press Ok.



beta.daycareworks.com says:

Successfully Posted

The next screen will allow the payment to be reconciled, make sure the correct deposit is selected and the search criteria matches your reconciliation. Press Search to display related student balances.



SUCCESS
Successfully Posted.

Agency Allocation

Agency: * Sample Agency

Select Deposit: Recon - Sample Agency for 11/30/2017 - dcw_kgass

Criteria

Center: DCW Transactional- Center 1

Invoice Period:

Post From Date: 11/01/2017

Post To Date: 11/30/2017

First Name:

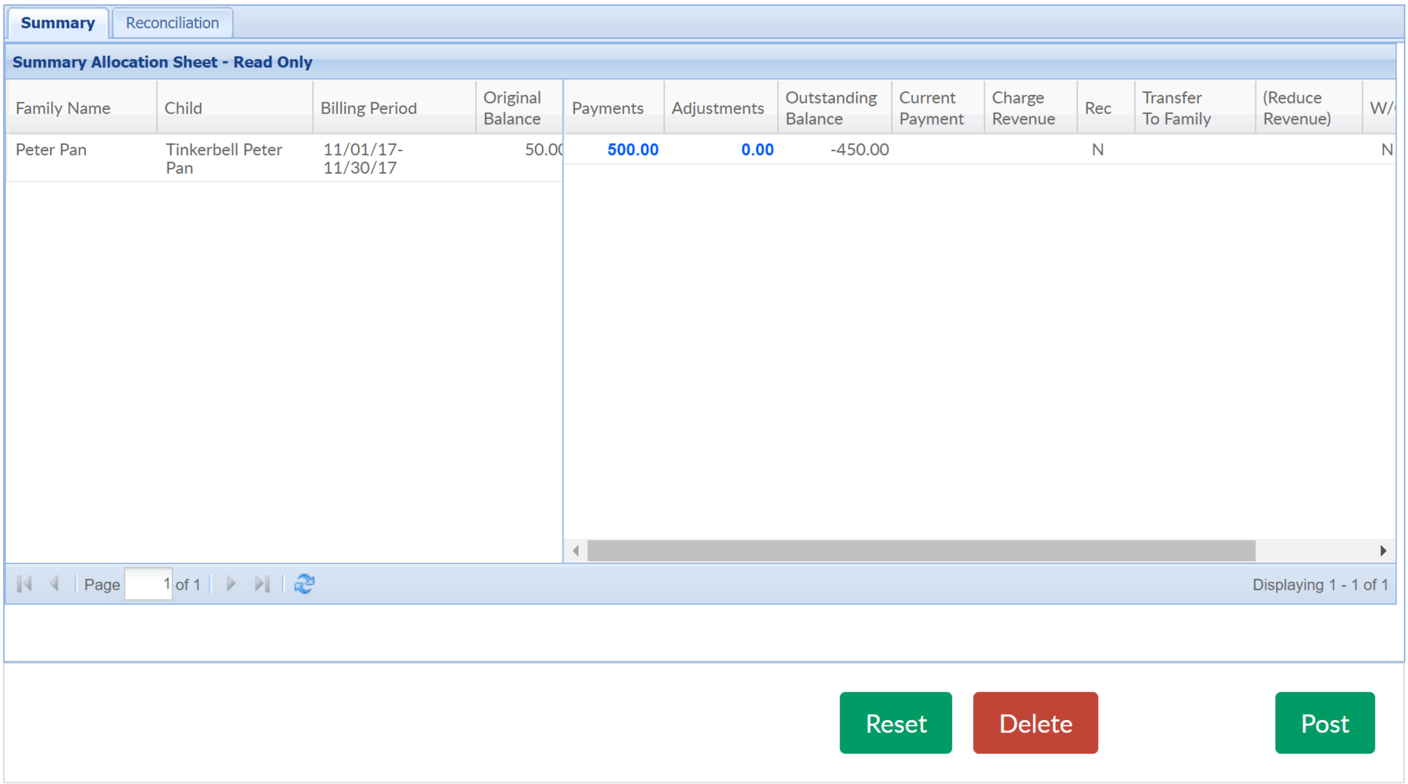
Last Name:

Outstanding Balance Greater Than: $

Outstanding Balance Less Than: $

There will be two tabs in the reconciliation area- the first will be a summary tab that will display information, then second will be the reconciliation tab.

Total Revenue Adjustments:	**0.00**
Total Transfer Adjustments to Family:	**0.00**
Total Bad Debt Recovery/(Write-Off):	**0.00**

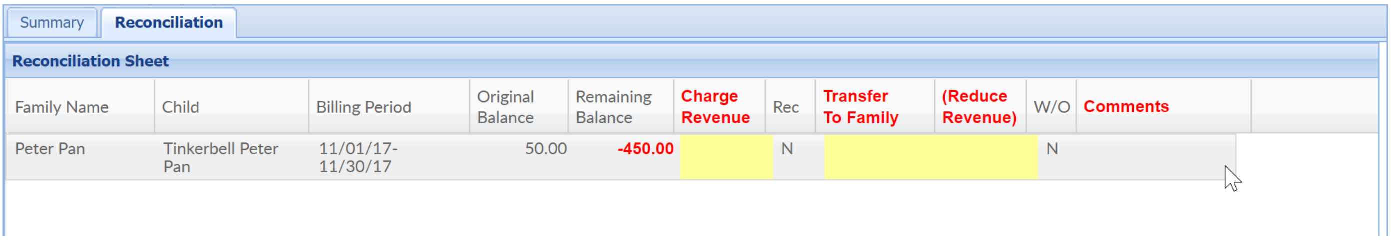


Summary Allocation Sheet - Read Only

Family Name	Child	Billing Period	Original Balance	Payments	Adjustments	Outstanding Balance	Current Payment	Charge Revenue	Rec	Transfer To Family	(Reduce Revenue)	W/
Peter Pan	Tinkerbell Peter Pan	11/01/17-11/30/17	50.0	**500.00**	**0.00**	-450.00			N			N

Select the reconciliation tab to make adjustments as needed.

- Charge Revenue- Adds a debit to the child's third party ledger to close out open credit (the number entered should be positive)
- Transfer to Family- Moves balance to the child's parent's ledger- this would be done if the parent needs to pay the overage
- Reduce Revenue- Adds a credit to the child's third party ledger to close out open debit (the number entered should be negative)



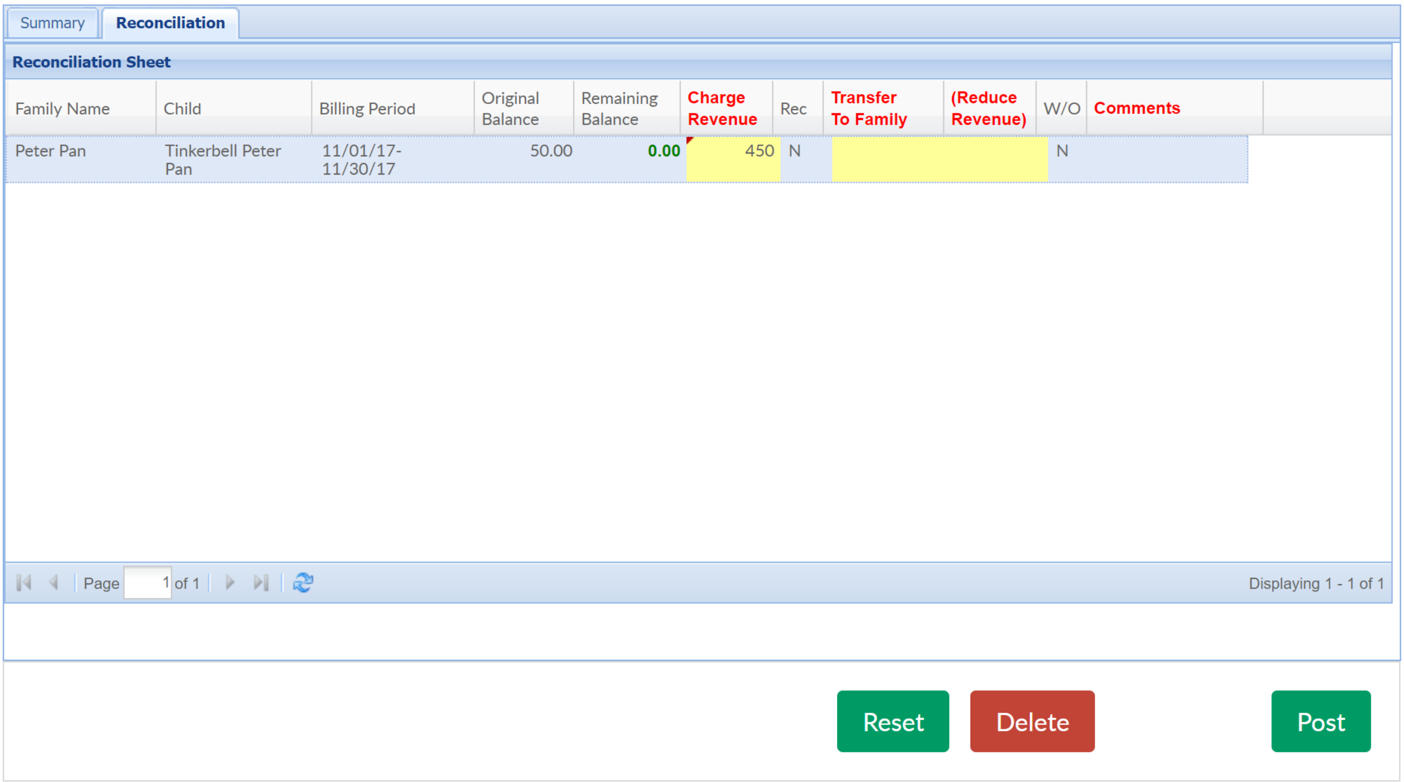
Reconciliation Sheet

Family Name	Child	Billing Period	Original Balance	Remaining Balance	**Charge Revenue**	Rec	**Transfer To Family**	**(Reduce Revenue)**	W/O	**Comments**
Peter Pan	Tinkerbell Peter Pan	11/01/17-11/30/17	50.00	**-450.00**		N			N	

Once adjustments/charges have been added, select the post button to complete the reconciliation.

Summary

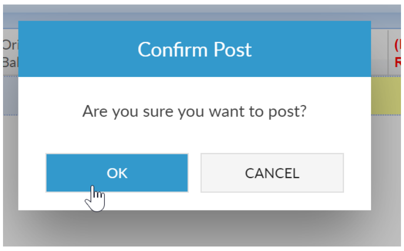
Total Revenue Adjustments:	450.00
Total Transfer Adjustments to Family:	0.00
Total Bad Debt Recovery/(Write-Off):	0.00



Reconciliation Sheet

Family Name	Child	Billing Period	Original Balance	Remaining Balance	Charge Revenue	Rec	Transfer To Family	(Reduce Revenue)	W/O	Comments
Peter Pan	Tinkerbell Peter Pan	11/01/17-11/30/17	50.00	0.00	450	N			N	

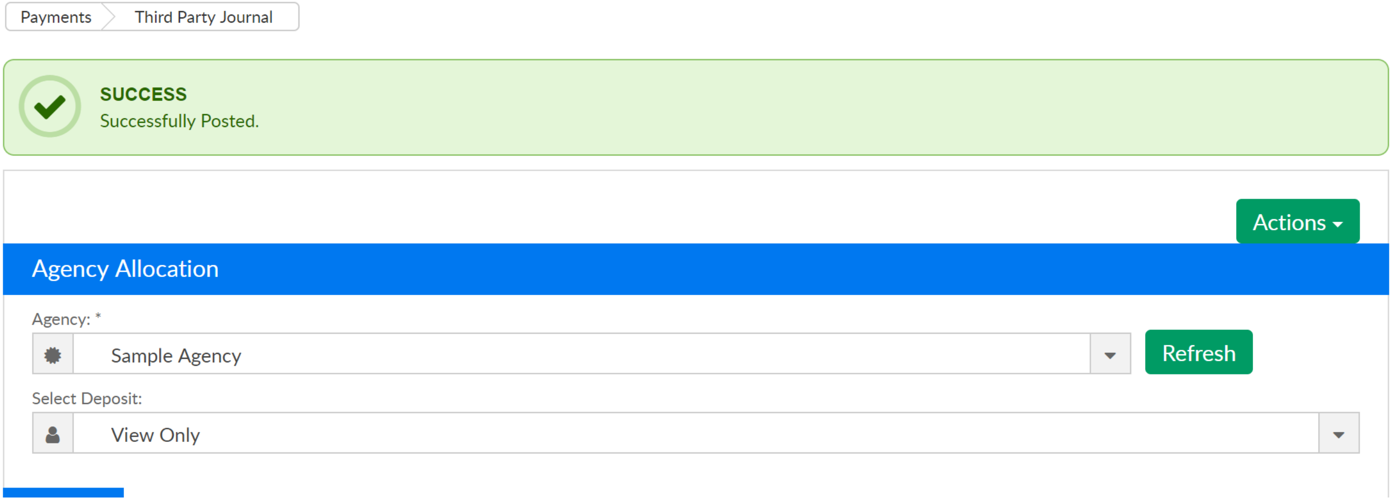
Confirm the posting should be completed-



Confirm Post

Are you sure you want to post?

A confirmation message will display when completed.



SUCCESS
Successfully Posted.

Agency Allocation

Agency: * Sample Agency

Select Deposit: View Only

Tips-

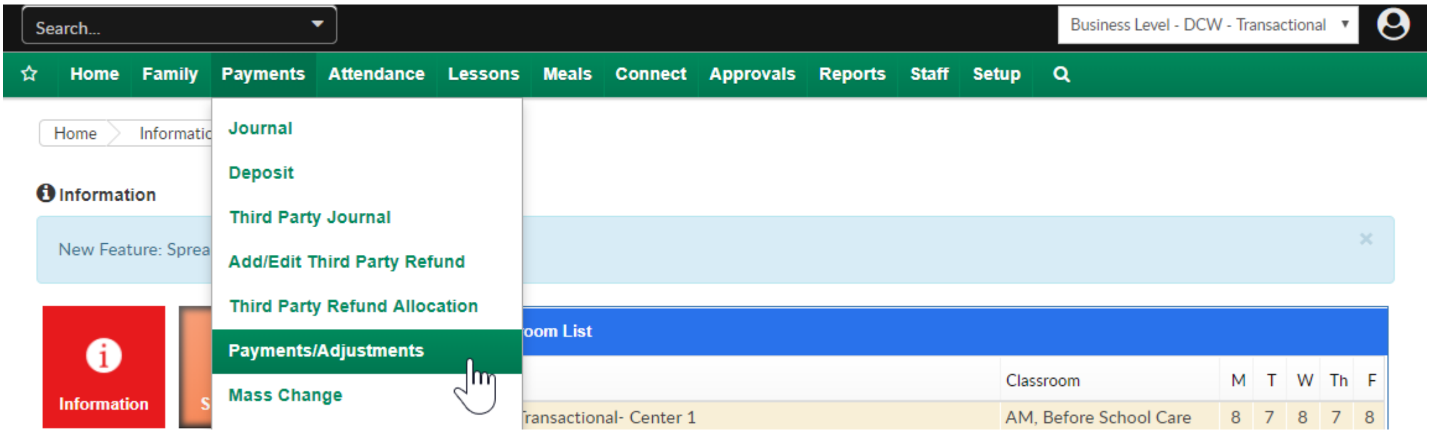
- Receipt and allocate by center, one at a time to make posting and reporting easier
- Children must have an open balance for a particular time/room/program on their financial ledger to display/be eligible for payment posting
- Third party payments and allocations will display on the Payments > Payments screen
- Go to Reports > Financial to pull an allocation list for third party payments (Report name- Allocated Third Party Payment Report- Excel).

Payments > Payments/Adjustments

Last Modified on 01/11/2019 7:57 am EST

The Payments > Payments screen allows users to search and display payments received in a particular period.

From the Payments menu, select Payments/Adjustments-

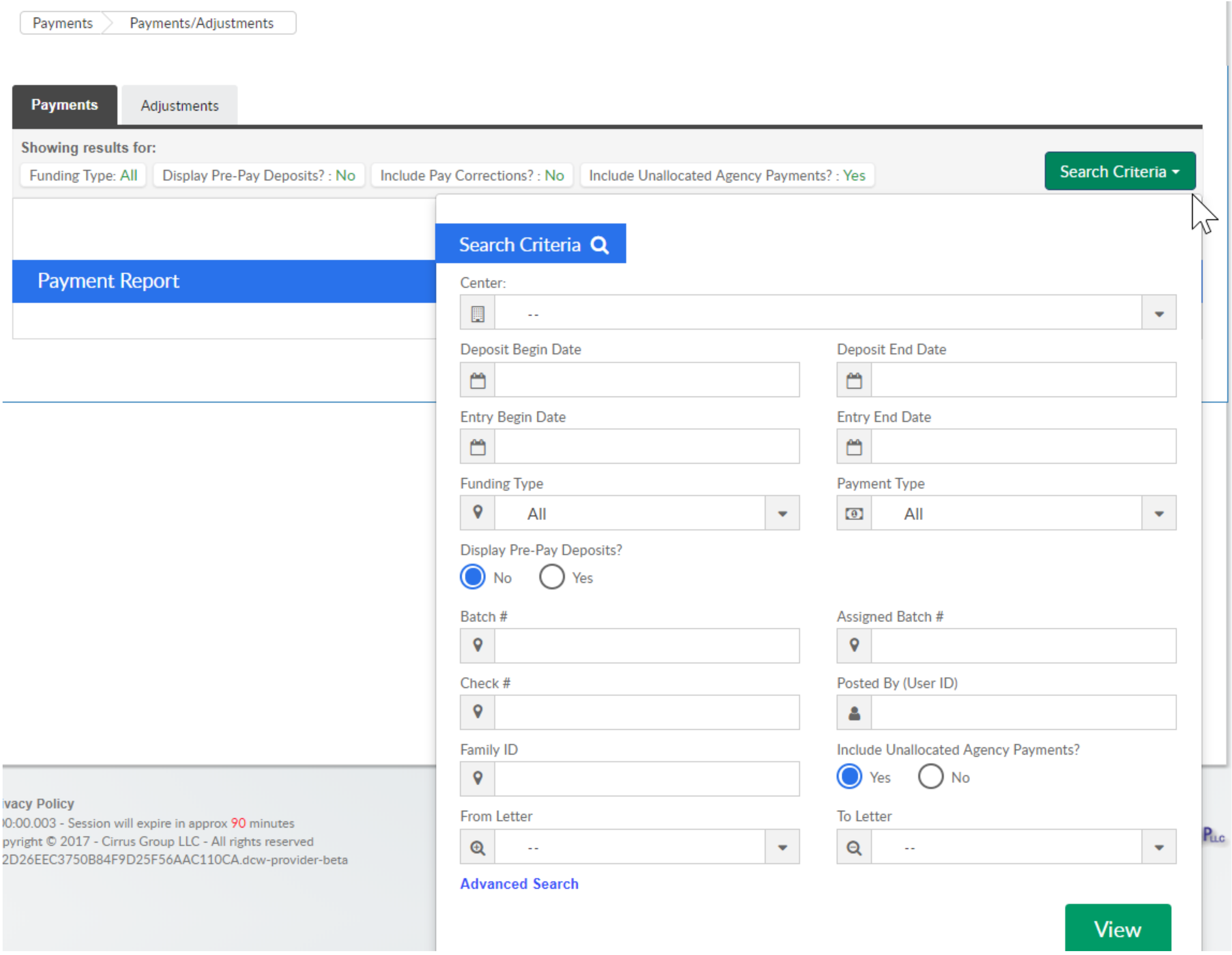


Select the Search Criteria button to begin searching. As much or as little detail can be added as desired, but always enter an entry begin date and an entry end date to see results.

- Center- view by center payments that have been receipted
- Deposit Begin Date
- Deposit End Date
- Entry Begin Date-*required*
- Entry End Date-*required*
- Funding Type
  - Copay/Parent Only
  - All- including third party/sponsor payments
  - Third Party/Sponsor Only
- Payment Type- if the user would only like to see one type of payment in the results
- Display Pre-Pay Deposits
  - Yes- pre-pay deposits will display in results
  - No- prepay deposits will not display in results

- Batch #- enter specific batch number (assigned by Cirrus Group)
- Assigned Batch #- enter specific batch number (assigned by user on Batch & Report screen)
- Check #- to search by specific check number
- Posted By (User ID)- to see only payments posted by a specific user
- Family ID- to see only one family's payments
- Include Allocated Agency Payments- to display outstanding credits from third party/sponsors
- From Letter- to search a range of the alphabet
- To Letter- to search a range of the alphabet
- Advanced Search- will allow users to search by brand, district or division of the values have been setup

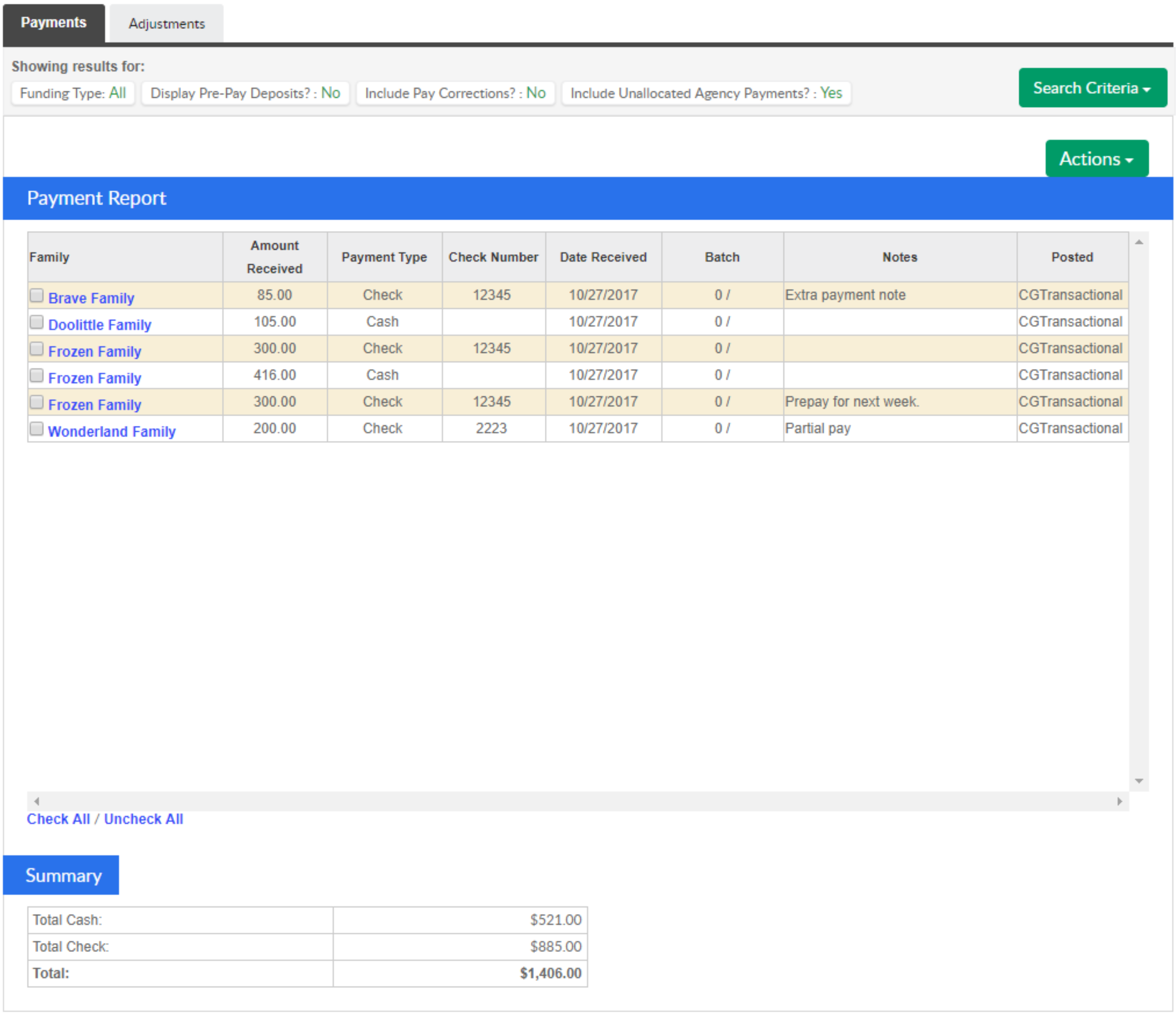
Once criteria has been added select View.



Showing results for:
Funding Type: All
Display Pre-Pay Deposits? : No
Include Pay Corrections? : No
Include Unallocated Agency Payments? : Yes

Center: --
Deposit Begin Date
Deposit End Date
Entry Begin Date
Entry End Date
Funding Type: All
Payment Type: All
Display Pre-Pay Deposits? ● No ○ Yes
Batch #
Assigned Batch #
Check #
Posted By (User ID)
Family ID
Include Unallocated Agency Payments? ● Yes ○ No
From Letter: --
To Letter: --

Search results will display in the Payment Report box, with a summary of the payments in the Summary section.



Showing results for:
Funding Type: All | Display Pre-Pay Deposits? : No | Include Pay Corrections? : No | Include Unallocated Agency Payments? : Yes

Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
☐ Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
☐ Doolittle Family	105.00	Cash		10/27/2017	0 /		CGTransactional
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactional
☐ Frozen Family	416.00	Cash		10/27/2017	0 /		CGTransactional
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
☐ Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

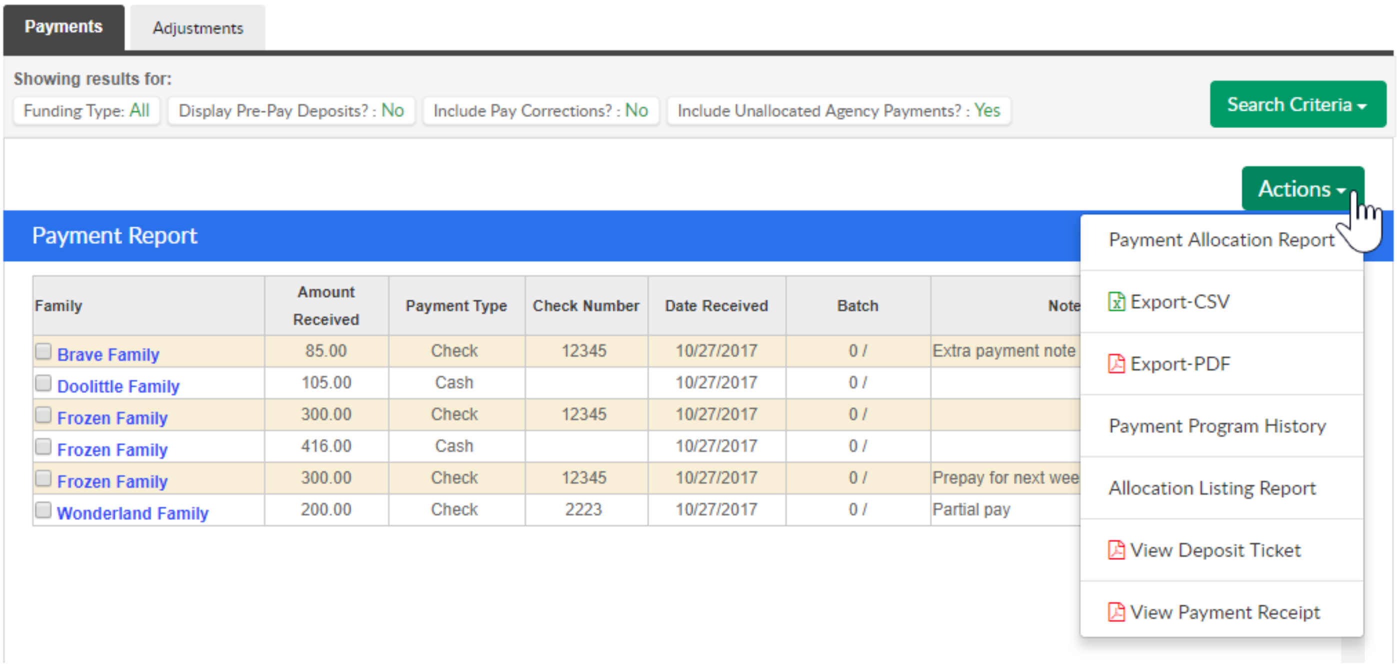
Check All / Uncheck All

Total Cash:	$521.00
Total Check:	$885.00
Total:	**$1,406.00**

To pull a report listing the payments press the Actions menu.

- Payment Allocations Report- Allows users to see payments that have not been fully allocated
- Export- CSV- creates an excel report for the payments that are displaying on the screen
- Export- PDF- creates a PDF report for the payments that are displaying on the screen

- Payment Program History- A list of the transactions, both incoming and outgoing to a facility.
- Allocation Listing Report- Displays allocations for payments
- View Deposit Ticket- select the check boxes next to payments in the payment report list before selecting this option, then when you select View Deposit Ticket, payments will display on a deposit ticket in PDF format for each payment that was selected.
- View Payment Receipt- select the check boxes next to payments in the payment report list before selecting this option, then when you select View Payment Receipt, receipts will pull in PDF format for each payment that was selected.



Showing results for:
Funding Type: All | Display Pre-Pay Deposits? : No | Include Pay Corrections? : No | Include Unallocated Agency Payments? : Yes

Payment Report

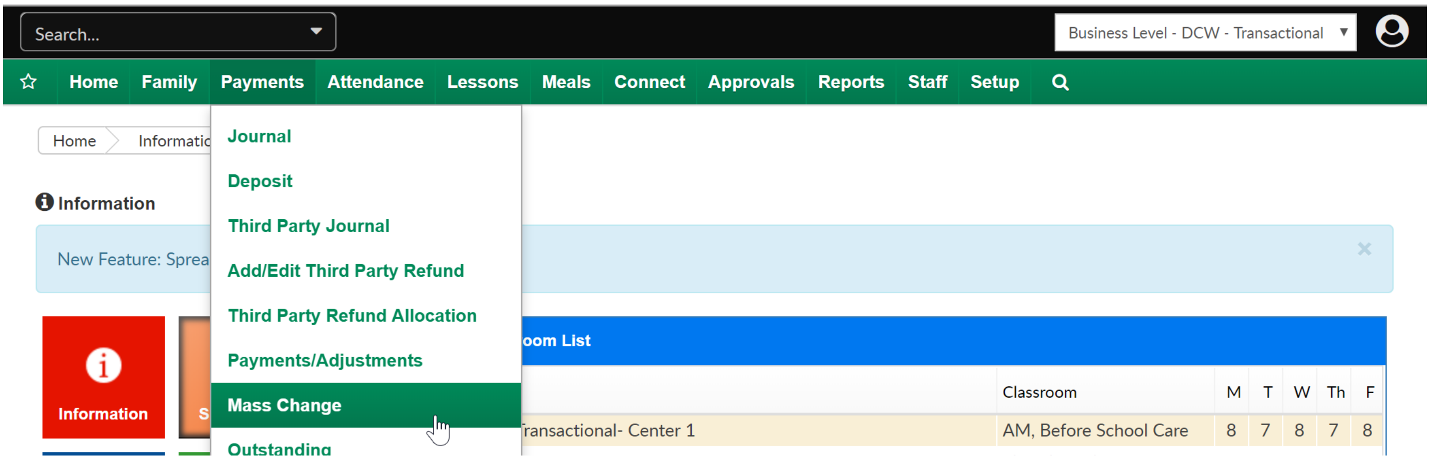
Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Note
☐ Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note
☐ Doolittle Family	105.00	Cash		10/27/2017	0 /	
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /	
☐ Frozen Family	416.00	Cash		10/27/2017	0 /	
☐ Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next wee
☐ Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay

Payments > Mass Change

Last Modified on 11/01/2017 9:12 am EDT

The mass change payments process updates multiple payments entered into the system at once. This is frequently used to update the deposit date, check number, payment type, period number or adding notes to previous payments.

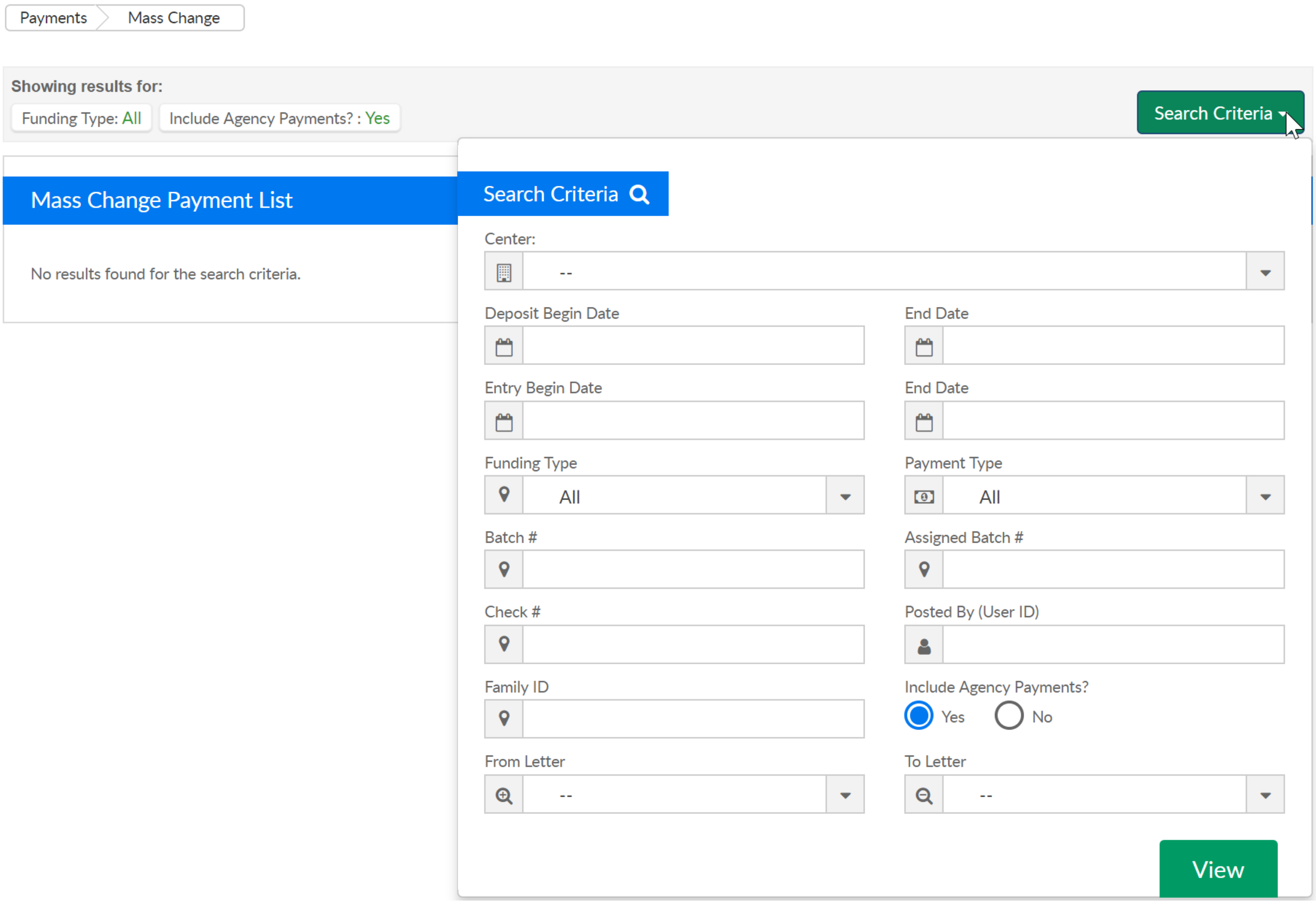
From the Payments menu select the Mass Change option.



On the Mass Change page, select the Search Criteria box to find payments that need to be updated or changed. Once you have entered criteria, press View to update results. *At the very least, search by Entry Begin Date and End Date to see payments.*

- *Center*
- Deposit Begin Date
- End Date
- Entry Begin Date
- End Date
- Funding Type
- Payment Type
- Batch #
- Assigned Batch #
- Check #
- Posted By (User ID)
- Family ID
- Include Agency Payments

- From Letter
- To Letter



Showing results for:
Funding Type: All
Include Agency Payments? : Yes

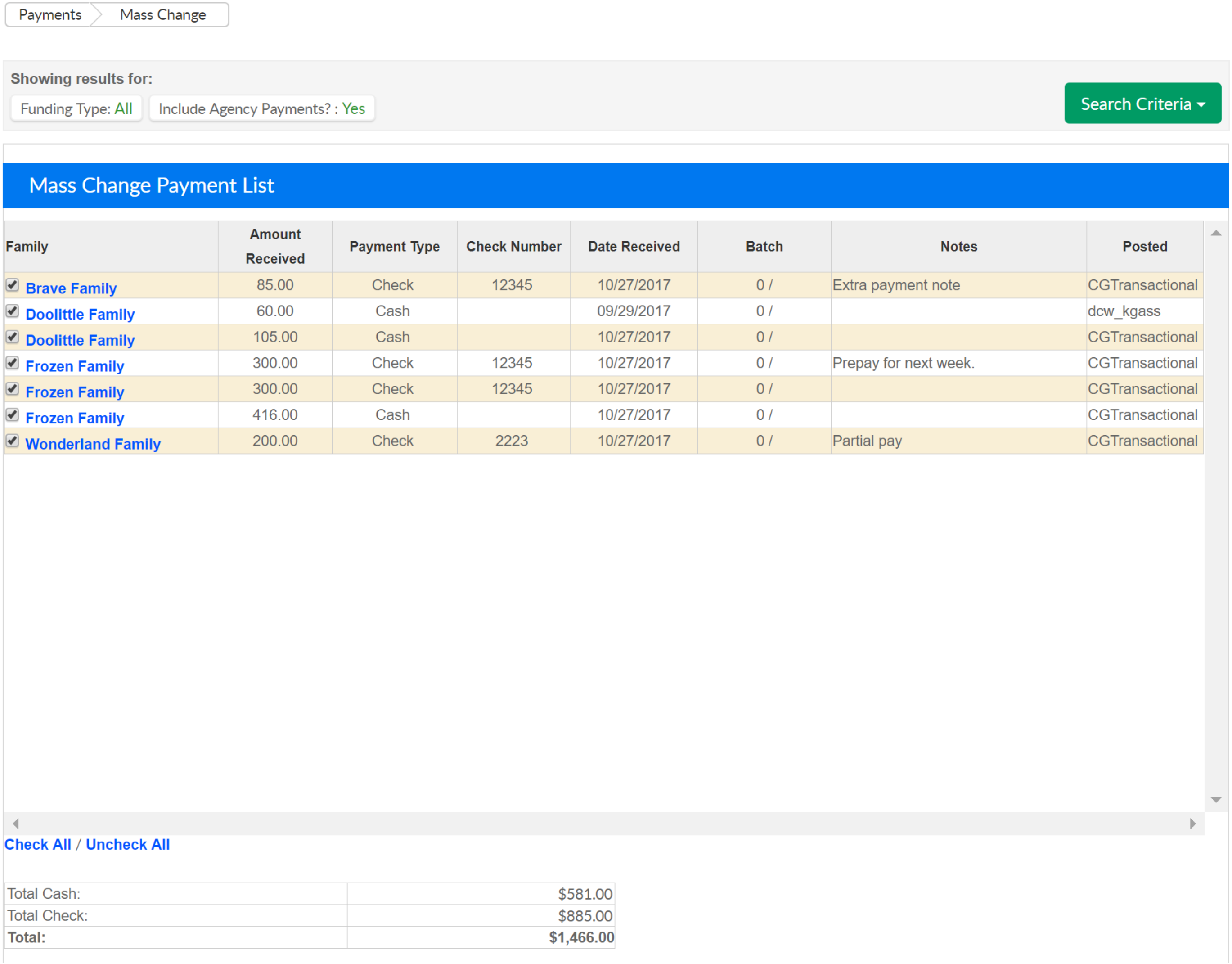
No results found for the search criteria.

Center: --
Deposit Begin Date
End Date
Entry Begin Date
End Date
Funding Type: All
Payment Type: All
Batch #
Assigned Batch #
Check #
Posted By (User ID)
Family ID
Include Agency Payments? ● Yes ○ No
From Letter: --
To Letter: --

Results based on search criteria will display.

- Family
- Amount Received
- Payment Type
- Check Number
- Date Received
- Batch
- Notes
- Posted

Select the payments in the Payment List section to identify the payments that will be changed. By default, all of the payments in the Payment List will be automatically checked.



Showing results for:

Funding Type: All | Include Agency Payments? : Yes

Mass Change Payment List

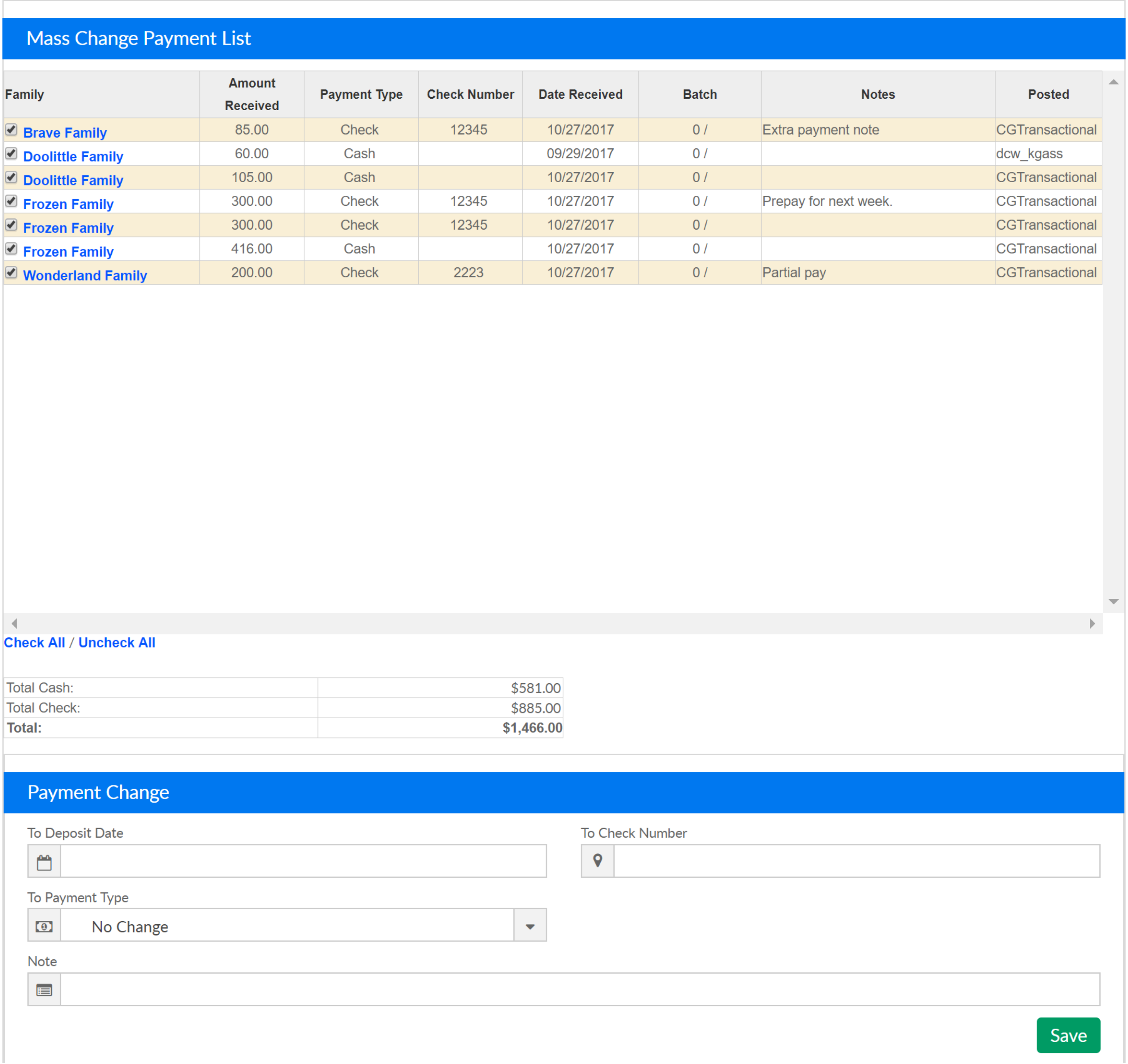
Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
☑ **Brave Family**	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
☑ **Doolittle Family**	60.00	Cash		09/29/2017	0 /		dcw_kgass
☑ **Doolittle Family**	105.00	Cash		10/27/2017	0 /		CGTransactional
☑ **Frozen Family**	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
☑ **Frozen Family**	300.00	Check	12345	10/27/2017	0 /		CGTransactional
☑ **Frozen Family**	416.00	Cash		10/27/2017	0 /		CGTransactional
☑ **Wonderland Family**	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

Check All / **Uncheck All**

Total Cash:	$581.00
Total Check:	$885.00
Total:	**$1,466.00**

In the Payment Box enter the new detail that the payments will be updated to include. After entering updated detail, press Save to commit changes.

- To Deposit Date- this will update the deposit date to the text entered for the selected payments
- To Check Number- this will update the check number to the text entered for the selected payments
- To Payment Type- this will change the payment type for the selected payments
- To Period- this option will only display if billing is set to defined, select the period the selected payments should be moved to
- Note- this will update the note text for the selected payments


Mass Change Payment List

Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
☑ Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
☑ Doolittle Family	60.00	Cash		09/29/2017	0 /		dcw_kgass
☑ Doolittle Family	105.00	Cash		10/27/2017	0 /		CGTransactional
☑ Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
☑ Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactional
☑ Frozen Family	416.00	Cash		10/27/2017	0 /		CGTransactional
☑ Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

Check All / Uncheck All

Total Cash:	$581.00
Total Check:	$885.00
Total:	**$1,466.00**

Payment Change

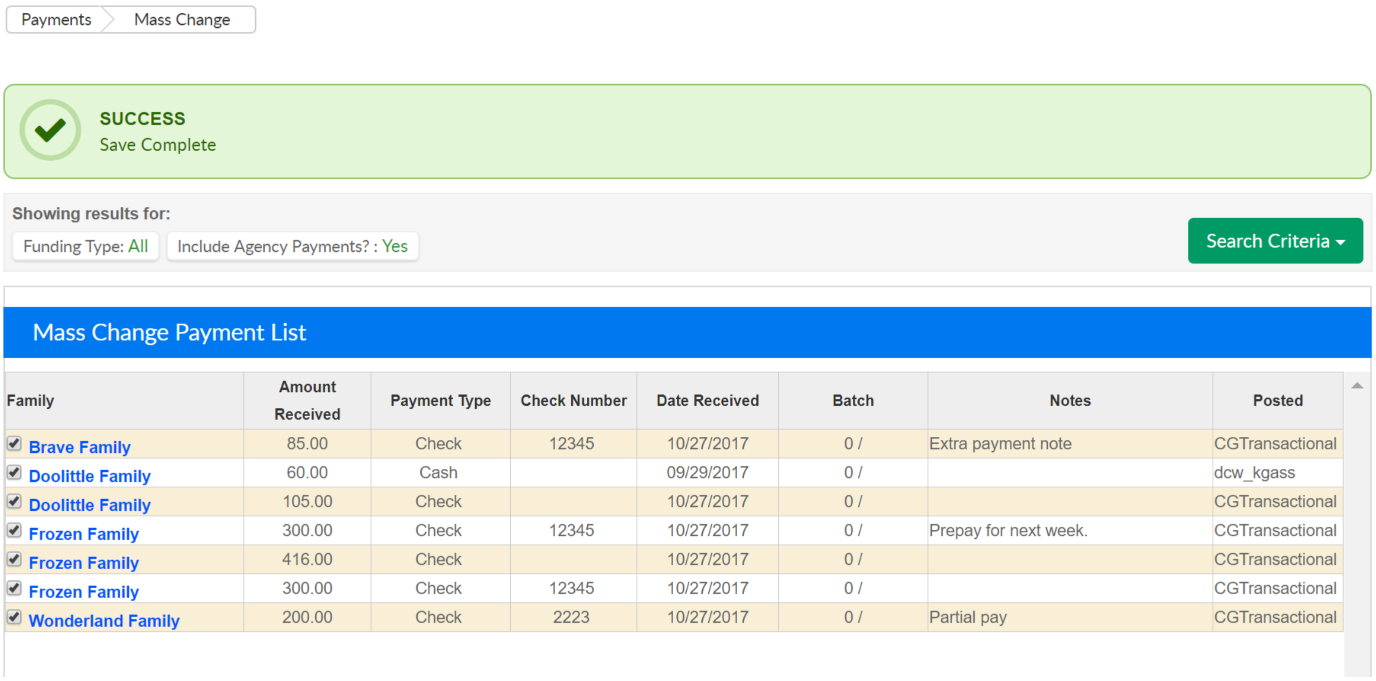
To Deposit Date

To Check Number

To Payment Type: No Change

Note

Once the change has been saved, a confirmation box will display-



SUCCESS
Save Complete

Showing results for:
Funding Type: All
Include Agency Payments? : Yes

Mass Change Payment List

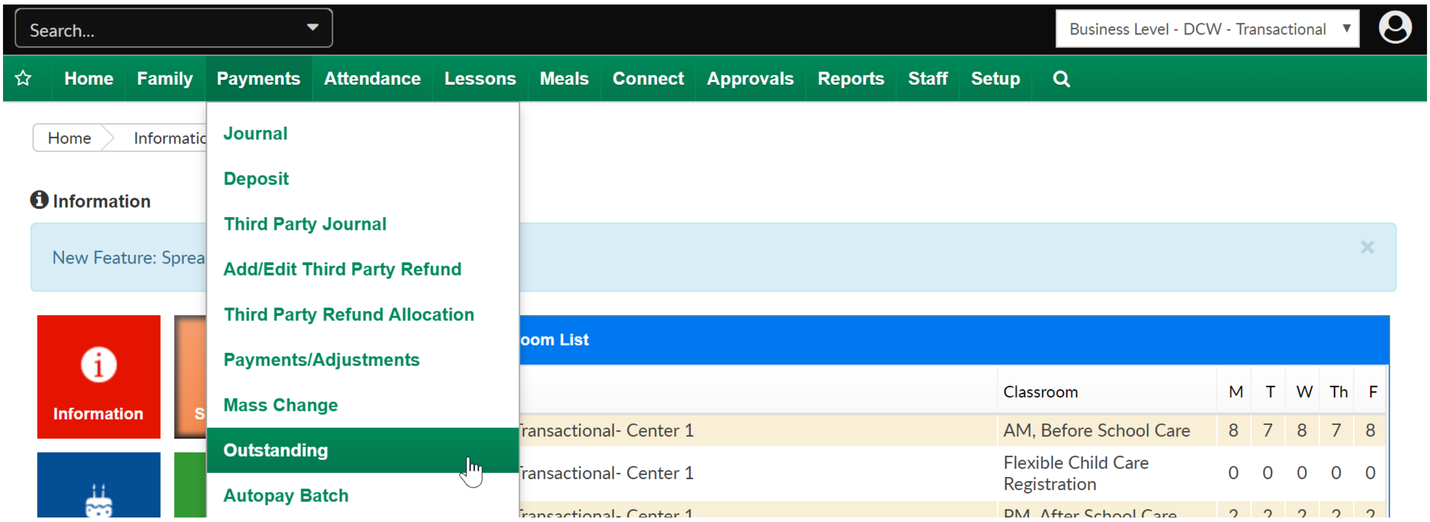
Family	Amount Received	Payment Type	Check Number	Date Received	Batch	Notes	Posted
☑ Brave Family	85.00	Check	12345	10/27/2017	0 /	Extra payment note	CGTransactional
☑ Doolittle Family	60.00	Cash		09/29/2017	0 /		dcw_kgass
☑ Doolittle Family	105.00	Check		10/27/2017	0 /		CGTransactional
☑ Frozen Family	300.00	Check	12345	10/27/2017	0 /	Prepay for next week.	CGTransactional
☑ Frozen Family	416.00	Check		10/27/2017	0 /		CGTransactional
☑ Frozen Family	300.00	Check	12345	10/27/2017	0 /		CGTransactional
☑ Wonderland Family	200.00	Check	2223	10/27/2017	0 /	Partial pay	CGTransactional

Payments > Outstanding

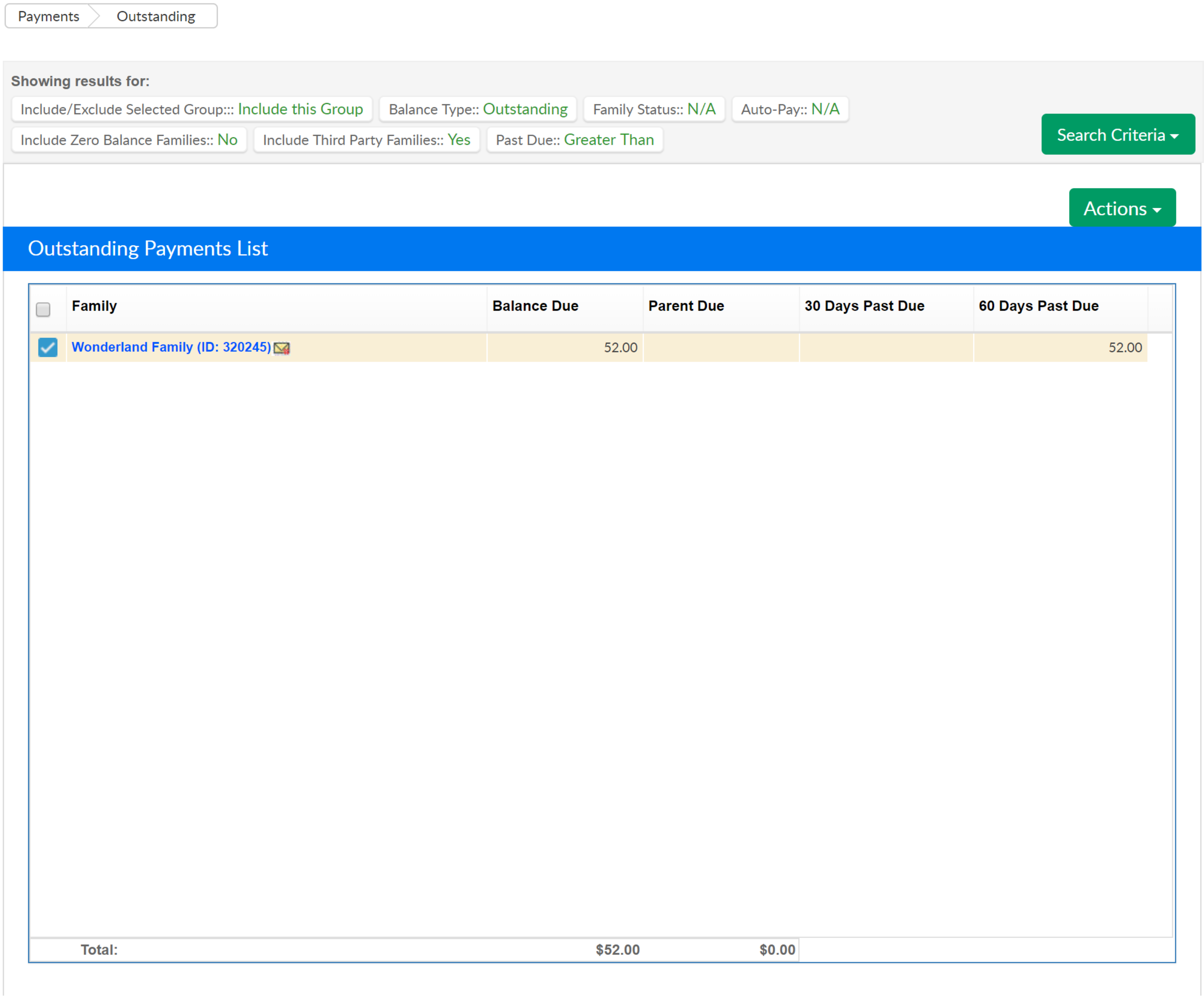
Last Modified on 05/11/2018 1:36 pm EDT

The Payments Outstanding screen will display amounts owed by families within the system. Use search criteria to display related families. Statement and Reminder emails can be sent from this page, Outstanding balance reports can also be pulled.

From the Payment menu, select the Outstanding option-



As a default the first screen will display families that have outstanding balances.



Showing results for:

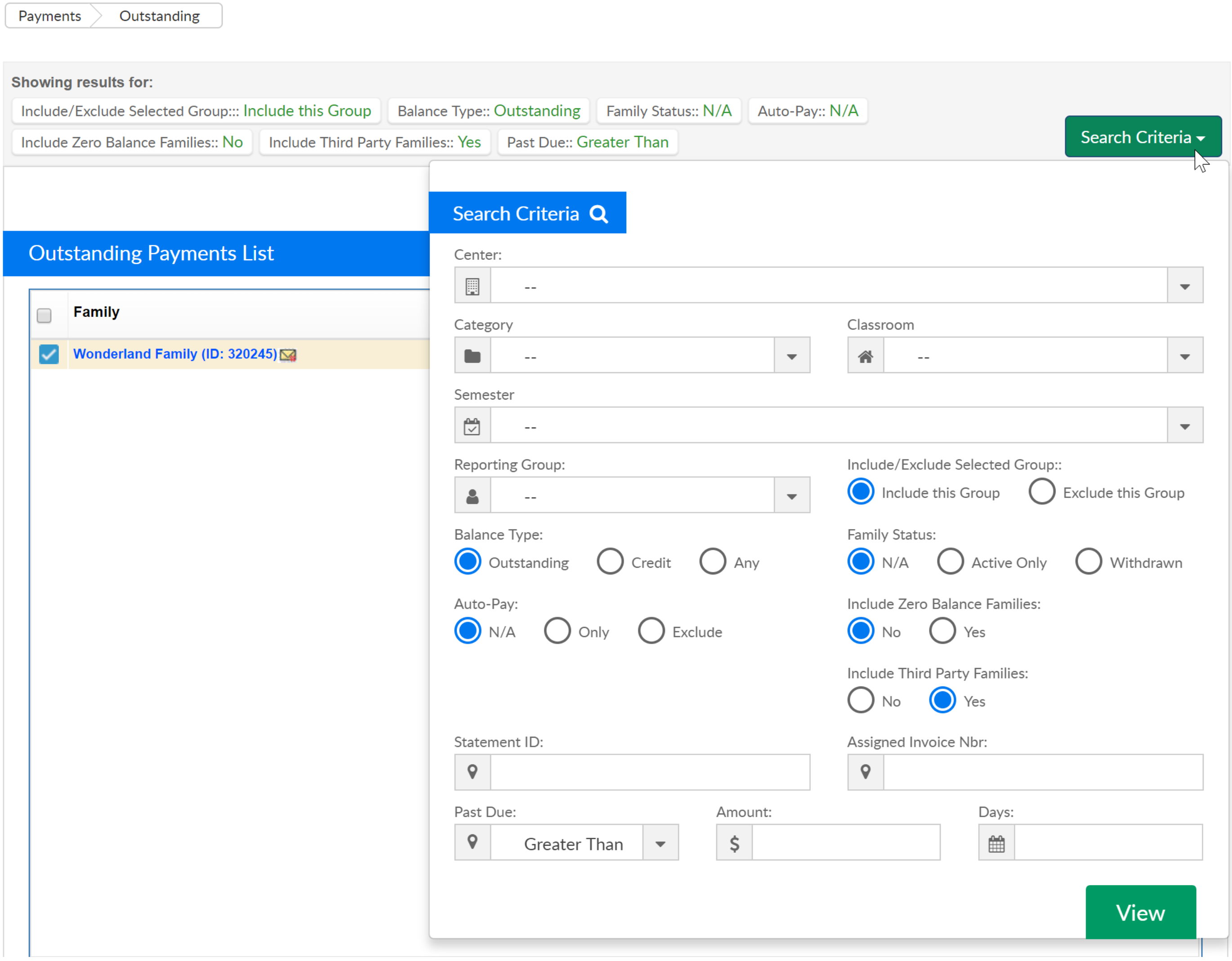
Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

☐	Family	Balance Due	Parent Due	30 Days Past Due	60 Days Past Due
☑	Wonderland Family (ID: 320245)	52.00			52.00
	Total:	$52.00	$0.00		

To change from the default criteria, select the Search Criteria button.

- Center- select a center to see results for a particular center (at the business level)
- Category- select a category to see results for families who have children enrolled in programs within a category
- Classroom- select a classroom to see results for families who have children enrolled
- Semester- select a semester to see results for families enrolled in programs attached to a semester
- Reporting Group- select a reporting group, then select if the group should be included or excluded from results
    - Include/Exclude Selected Group
- Balance Type

  - Outstanding- displays family with balances due
  - Credit- displays families with credit totals
  - Any- displays families with either credit or debit balances
- Family Status
  - N/A- results will not filter by status
  - Active- displays only active families
  - Withdrawn- displays only withdrawn family balances
- Auto-Pay
  - N/A- results will not filter by auto-pay type
  - Only- displays only auto-pay families
  - Exclude- does not display families with auto-pay
- Include Zero Balance Families
  - No- results will not include families with a zero balance on their financial ledger
  - Yes- results will include families with a zero balance on their financial ledger
- Include Third Party Families
  - No- results will not include families who receive third party sponsorship
  - Yes- results will include families who receive third party sponsorship
- Statement ID- to search for a particular statement ID- found on a family's financial ledger
- Assigned Invoice No- to search for a particular invoice number- found on a family's financial ledger
- Past Due- select Greater Than, Less Than or Equal to either an amount or a number of days
  - Amount- enter an amount threshold to search on based on the past due selection above
  - Days- enter a number of days threshold to search on based on the past due selection above



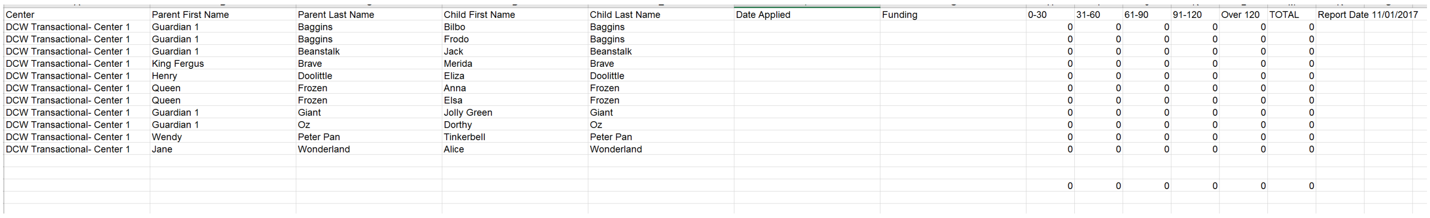
Showing results for:
Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

☐ Family
☑ Wonderland Family (ID: 320245)

Center: --
Category: --
Classroom: --
Semester: --
Reporting Group: --
Include/Exclude Selected Group:: ● Include this Group ○ Exclude this Group
Balance Type: ● Outstanding ○ Credit ○ Any
Family Status: ● N/A ○ Active Only ○ Withdrawn
Auto-Pay: ● N/A ○ Only ○ Exclude
Include Zero Balance Families: ● No ○ Yes
Include Third Party Families: ○ No ● Yes
Statement ID:
Assigned Invoice Nbr:
Past Due: Greater Than
Amount: $
Days:

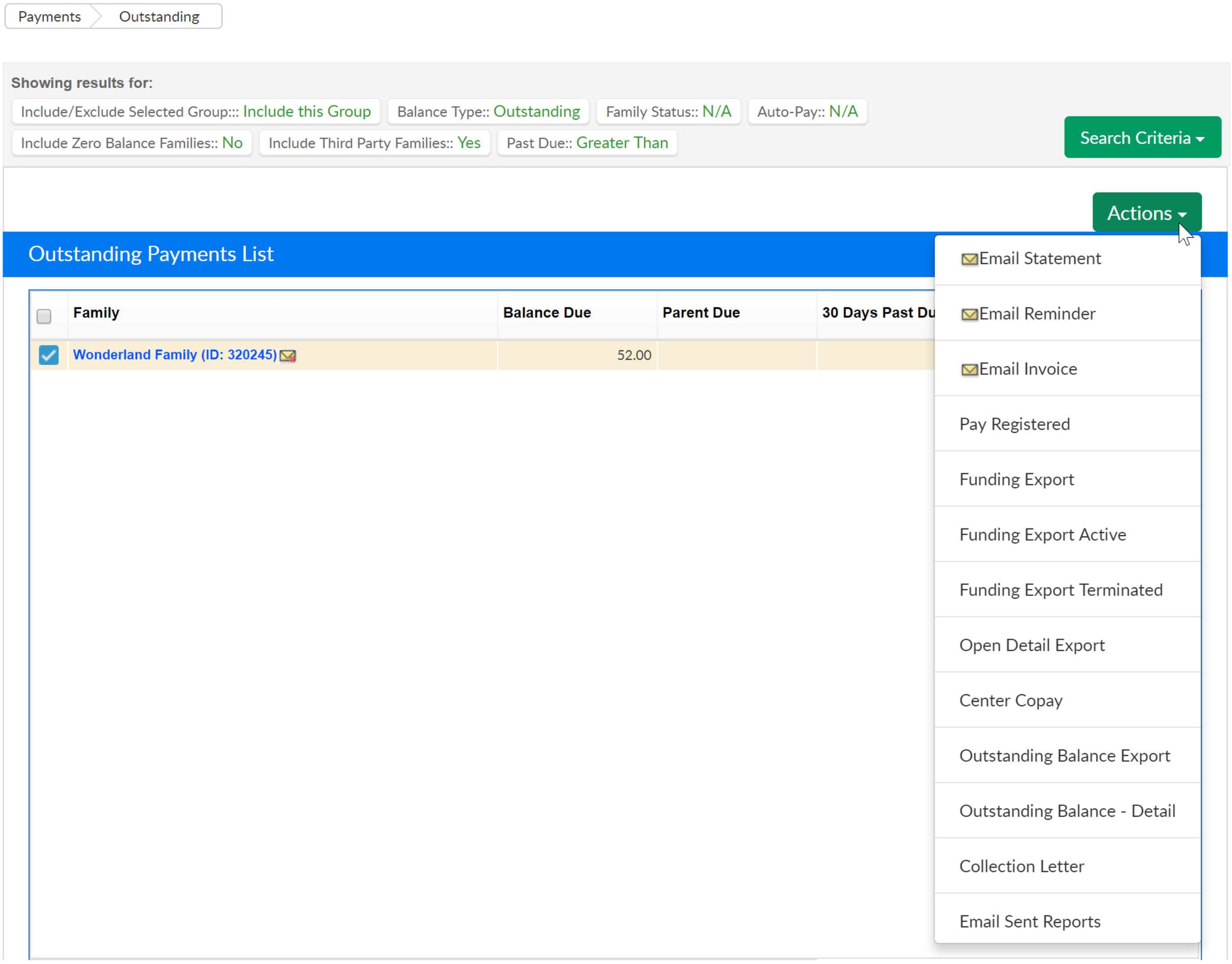
Once families are displaying, select the Actions menu to send statement or reminder emails, pull balance reports, and more-

- Email Statement- emails the families their current balance
- Email Reminder- emails a reminder that includes the billing invoice to the families
- Email Invoice-sends an invoice to the families, user is able to select a specific date range to include on the statement
- Pay Registered- submits a payment to all of the families with an auto-pay setup, click on the Pay Registered link. Families with auto-pay setup will have an arrow circle icon to the left of their names
- Funding Export- a report that will display if a family is sponsored, and the type of funding they have had applied to their balance (third party payments)



Center	Parent First Name	Parent Last Name	Child First Name	Child Last Name	Date Applied	Funding	0-30	31-60	61-90	91-120	Over 120	TOTAL	Report Date 11/01/2017
DCW Transactional- Center 1	Guardian 1	Baggins	Bilbo	Baggins			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Baggins	Frodo	Baggins			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Beanstalk	Jack	Beanstalk			0	0	0	0	0	0	
DCW Transactional- Center 1	King Fergus	Brave	Merida	Brave			0	0	0	0	0	0	
DCW Transactional- Center 1	Henry	Doolittle	Eliza	Doolittle			0	0	0	0	0	0	
DCW Transactional- Center 1	Queen	Frozen	Anna	Frozen			0	0	0	0	0	0	
DCW Transactional- Center 1	Queen	Frozen	Elsa	Frozen			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Giant	Jolly Green	Giant			0	0	0	0	0	0	
DCW Transactional- Center 1	Guardian 1	Oz	Dorthy	Oz			0	0	0	0	0	0	
DCW Transactional- Center 1	Wendy	Peter Pan	Tinkerbell	Peter Pan			0	0	0	0	0	0	
DCW Transactional- Center 1	Jane	Wonderland	Alice	Wonderland			0	0	0	0	0	0	
							0	0	0	0	0	0	

- Funding Export Active
- Funding Export Terminated
- Open Detail Export
- Center Copay
- Outstanding Balance Export
- Outstanding Balance- Detail
- Collection Letter
- Email Sent Report



Showing results for:

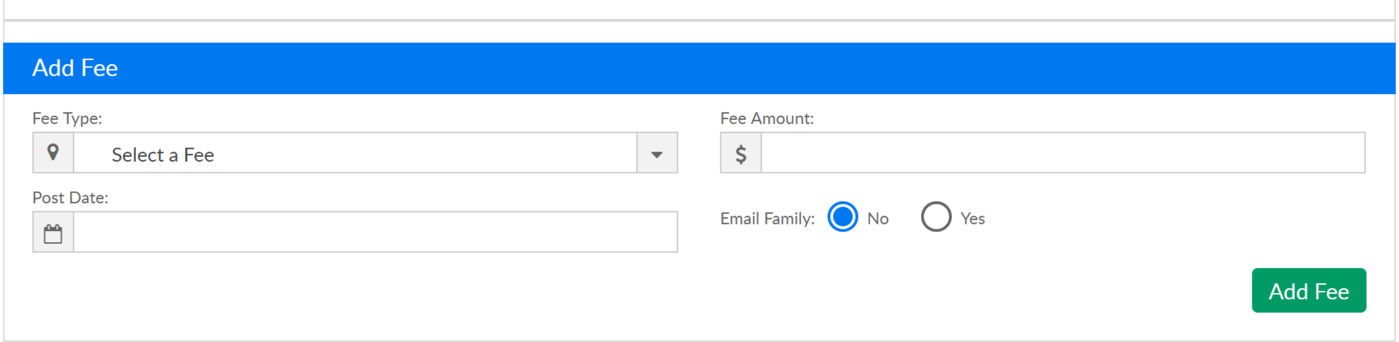
Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

☐	Family	Balance Due	Parent Due	30 Days Past Du
☑	Wonderland Family (ID: 320245)	52.00		

Late Fees can also be added from this page, scroll to the very bottom of the page to the Add Fees section.

- Fee Type- Select the type of fee that should be charged. From this page, you should only add Late Payment or Pickup fees
- Fee Amount- Enter the amount that should be charged per family
- Post Date- Enter the date that should display on family statements
- Email Family- Select No if you do not want to email families, select Yes to email families that a charge has been added to their statement

Once detail has been entered, press Add Fee. Any family that was selected above will have a fee added to their financial ledger.



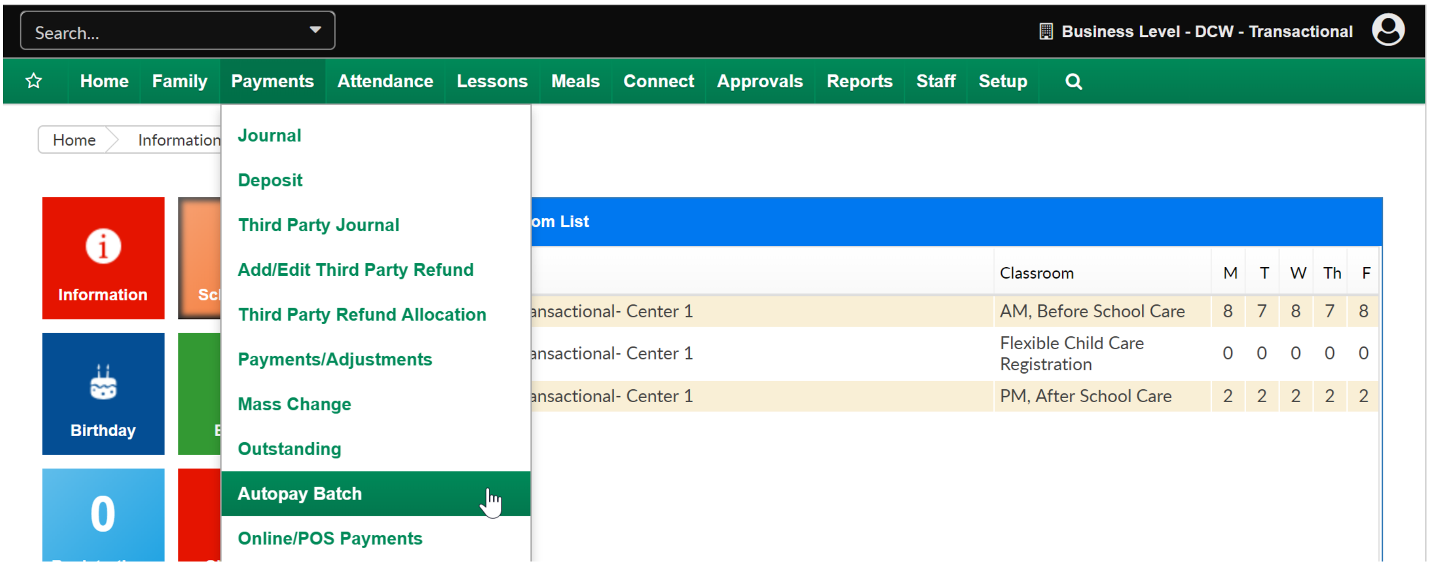
Payments > Autopay Batch

Last Modified on 03/14/2018 9:23 am EDT

Processing auto payments in the system allows administrators the ability to charge and collect money from parents that have an auto payment setup. Parents can add auto-pay information from the parent portal or admins can add a payment method from the family record's auto-pay tab.

For auto payments to be processed, a payment gateway must be setup within the system (the site must be setup for credit card and/or ACH processing).

There are two ways auto-pays will process, the first is on an automated basis- the system will pickup and pay open balances according to the schedule setup/selected by parents or admins and the second on a variable/full amount basis- where an administrator would need to go to the payments > auto-pay batch tab to batch out payments.

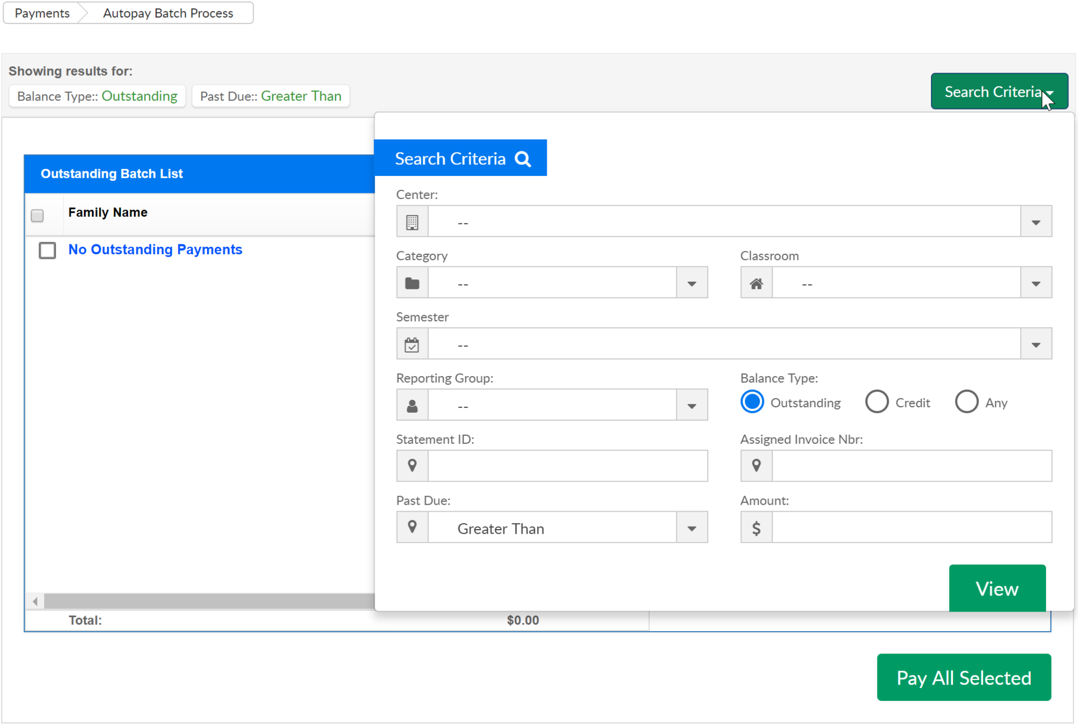


	Classroom	M	T	W	Th	F
ansactional- Center 1	AM, Before School Care	8	7	8	7	8
ansactional- Center 1	Flexible Child Care Registration	0	0	0	0	0
ansactional- Center 1	PM, After School Care	2	2	2	2	2

The payments > auto-pay batch screen will only be used if a center is manually batching out auto-pay payments. Select the Search Criteria button to open search options. Results displayed in the Outstanding Batch List can be sorted by:

- Center
- Category
- Classroom
- Semester
- Reporting Group
- Balance Type

- Statement ID
- Assigned Invoice No
- Past Due
- Amount



Showing results for:
Balance Type:: Outstanding
Past Due:: Greater Than

Center: --
Category: --
Classroom: --
Semester: --
Reporting Group: --
Balance Type: ● Outstanding ○ Credit ○ Any
Statement ID:
Assigned Invoice Nbr:
Past Due: Greater Than
Amount: $

Once View is selected all families that match the criteria with open balances will display. Check or Uncheck their box to include or exclude them from the batch. Once all families are selected that should be included press Pay All Selected to charge the parent's auto-pay accounts on file.

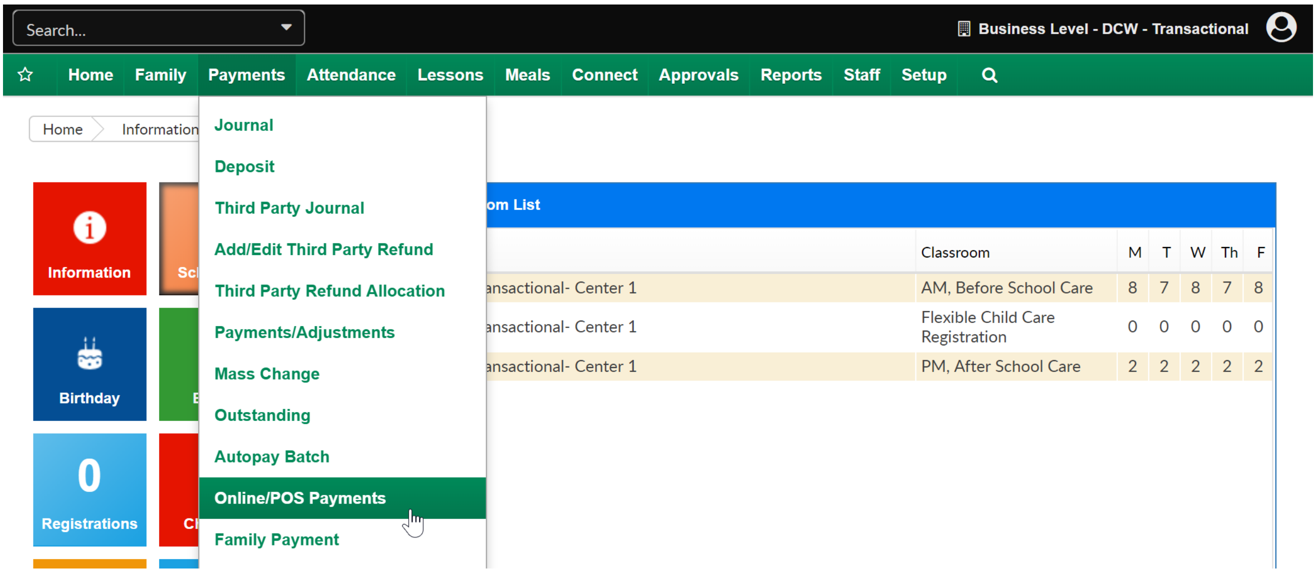
A confirmation box will display when the batch is completed. A report can be ran from the payments > online/pos payments screen or from the reports > payments screen- then select Auto-pay Status Report. Click on the blue number to open an excel report with detail.

Note: This will trigger the auto-pay success or auto-pay failure templates to send. These templates can be edited by going to setup > system config and selecting the email option.

Payments > Online/POS Payments

Last Modified on 03/30/2018 8:36 am EDT

The Payments > Online/POS Payments screen allows users to pull a report that displays gateway (ACH or Credit Card payments) that have been processed through the system.



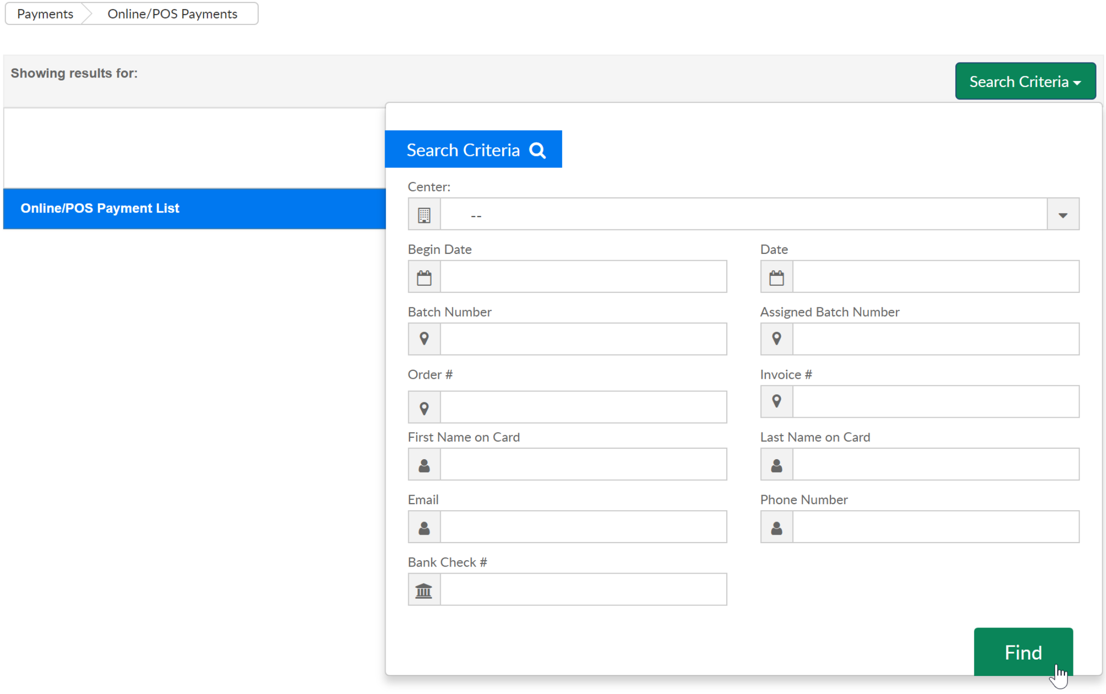
Home > Information

om List

	Classroom	M	T	W	Th	F
ansactional- Center 1	AM, Before School Care	8	7	8	7	8
ansactional- Center 1	Flexible Child Care Registration	0	0	0	0	0
ansactional- Center 1	PM, After School Care	2	2	2	2	2

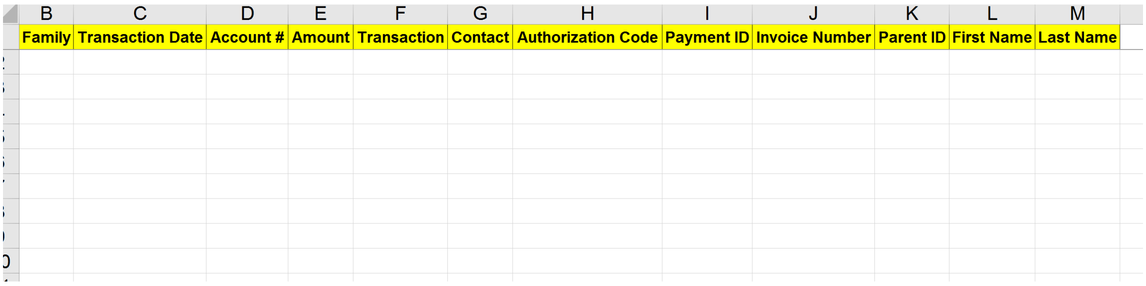
On the Online/POS Payments screen, select the Search Criteria button to enter search detail. After selecting Find any payments that match criteria will display in the Online/POS Payment List screen-

- Center
- Begin Date- start of date range
- Date- end of date range
- Batch Number- batch number will display on gateway/processor reporting
- Assigned Batch Number
- Order #- order number will display on gateway/processor reporting
- Invoice #- invoice number will display on gateway/processor reporting
- First Name on Card
- Last Name on Card
- Email
- Phone Number
- Bank Check #



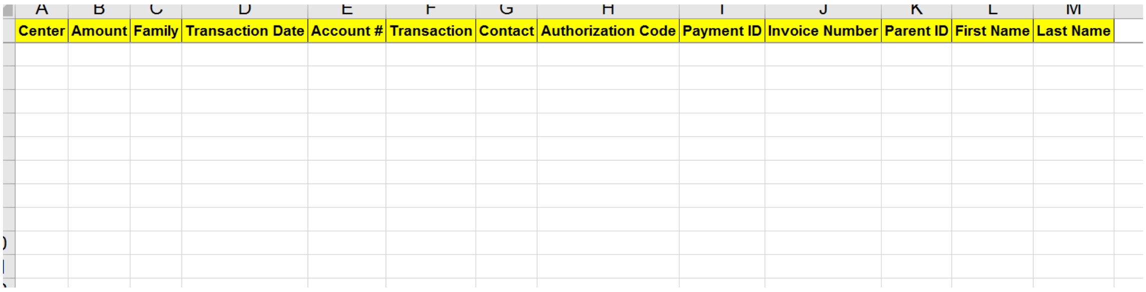
Displayed results can be exported to Excel for further reconciliation or analysis by selecting the Actions drop-down menu.

- Export- Excel, fields that will display are below-



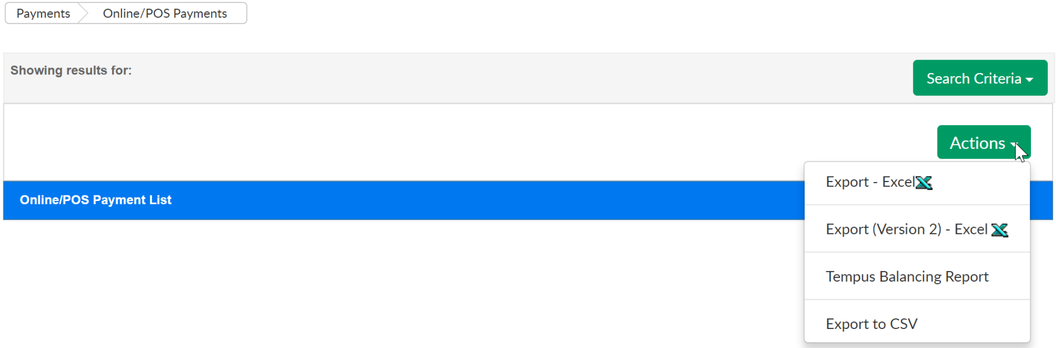
B	C	D	E	F	G	H	I	J	K	L	M
Family	Transaction Date	Account #	Amount	Transaction	Contact	Authorization Code	Payment ID	Invoice Number	Parent ID	First Name	Last Name

- Export (Version 2)- Excel, fields that will display are below (formatting differences)-



A	B	C	D	E	F	G	H	I	J	K	L	M
Center	Amount	Family	Transaction Date	Account #	Transaction	Contact	Authorization Code	Payment ID	Invoice Number	Parent ID	First Name	Last Name

- Tempus Balancing Report (used only if site is setup with Tempus payment processing)
- Export to CSV

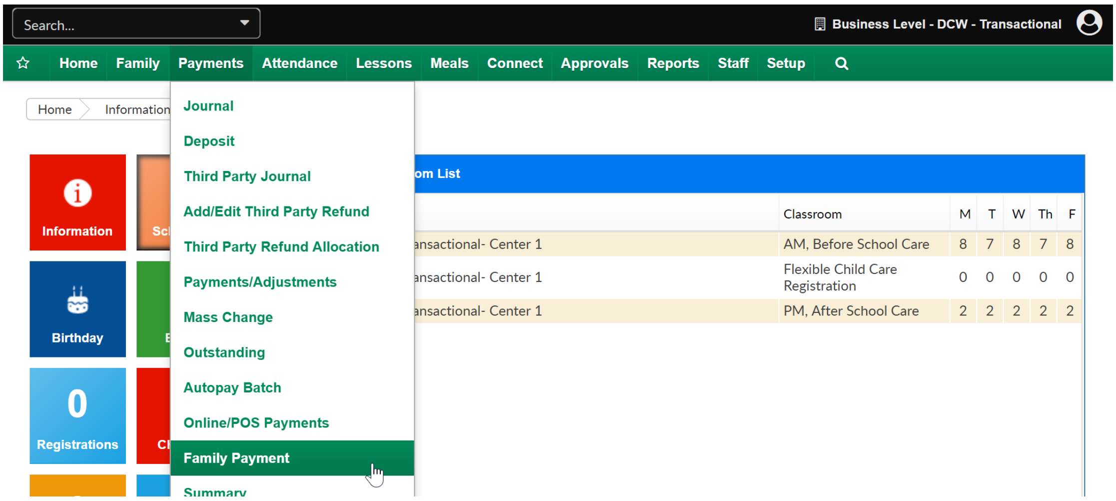

Payments
Online/POS Payments
Showing results for:
Search Criteria
Actions
Online/POS Payment List
Export - Excel
Export (Version 2) - Excel
Tempus Balancing Report
Export to CSV

Payments > Family Payment

Last Modified on 03/30/2018 8:37 am EDT

The Payments > Family Payment screen allows users to pull different versions of year-end tax statements. This is most useful if a site will be printing off and mailing or distributing tax statements.

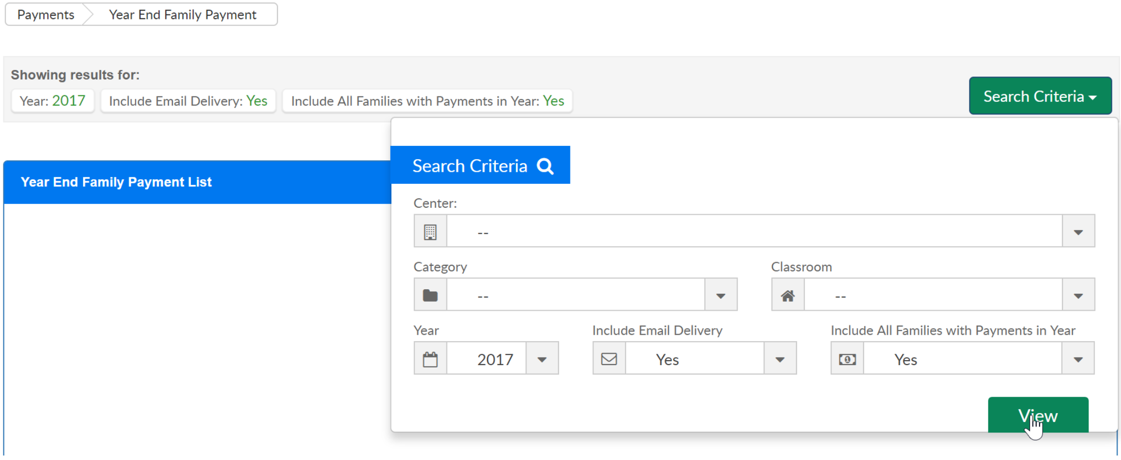
- If a site would like to email a copy of a family's year-end statement, the email can be sent from the Connect > Communication option (be sure to select the option to include the year-end tax statement before sending the email).
- Parents can self-service from the parent portal .



	Classroom	M	T	W	Th	F
ansactional- Center 1	AM, Before School Care	8	7	8	7	8
ansactional- Center 1	Flexible Child Care Registration	0	0	0	0	0
ansactional- Center 1	PM, After School Care	2	2	2	2	2

On the Family Payment screen, select the Search Criteria button to enter detail for the families that should display- then press View.

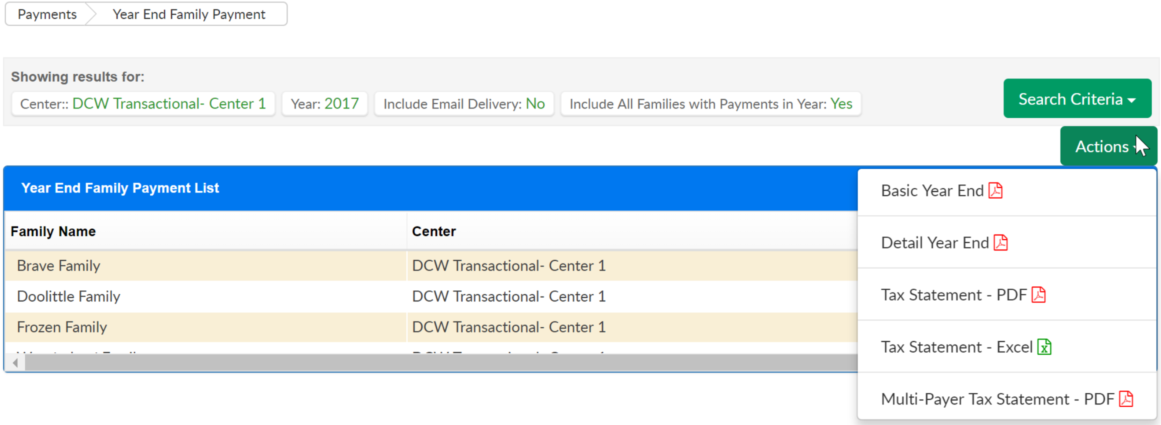
- Center- REQUIRED this can only be processed for one center at a time
- Category
- Classroom
- Year- year the payment was received in
- Include Email Delivery- if statements should be emailed out to families
- Include All Families with Payments in Year- will allow inactive families with payments to display in batch



Showing results for:
Year: 2017 Include Email Delivery: Yes Include All Families with Payments in Year: Yes

Center: --
Category: --
Classroom: --
Year: 2017
Include Email Delivery: Yes
Include All Families with Payments in Year: Yes

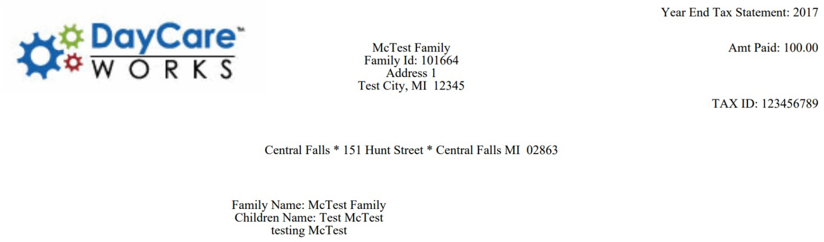
Once results display in the Year End Family Payment List, select the Actions menu to pull PDF or Excel copies of the statements.



Showing results for:
Center:: DCW Transactional- Center 1 Year: 2017 Include Email Delivery: No Include All Families with Payments in Year: Yes

Family Name	Center
Brave Family	DCW Transactional- Center 1
Doolittle Family	DCW Transactional- Center 1
Frozen Family	DCW Transactional- Center 1

- Basic Year End- no detail, just an amount paid in the upper right corner



Year End Tax Statement: 2017

McTest Family
Family Id: 101664
Address 1
Test City, MI 12345

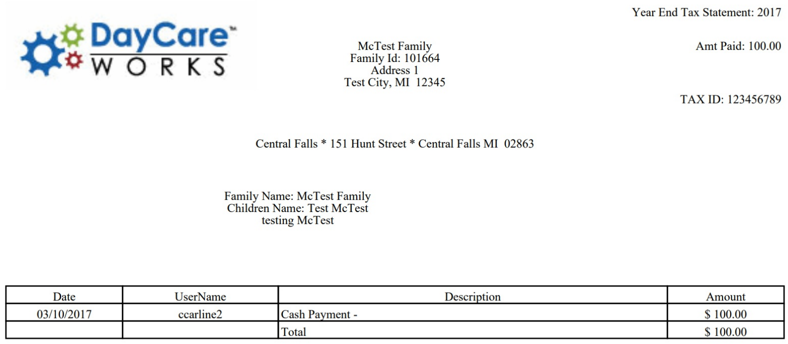
Amt Paid: 100.00

TAX ID: 123456789

Central Falls * 151 Hunt Street * Central Falls MI 02863

Family Name: McTest Family
Children Name: Test McTest
testing McTest

- Detail Year End- specific payment detail by family-



Year End Tax Statement: 2017

McTest Family
Family Id: 101664
Address 1
Test City, MI 12345

Amt Paid: 100.00

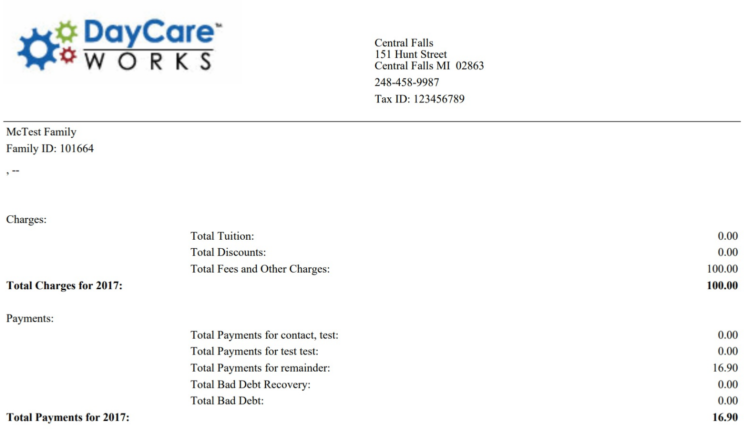
TAX ID: 123456789

Central Falls * 151 Hunt Street * Central Falls MI 02863

Family Name: McTest Family
Children Name: Test McTest
testing McTest

Date	UserName	Description	Amount
03/10/2017	ccarline2	Cash Payment -	$ 100.00
		Total	$ 100.00

- Tax Statement- PDF- displays a breakdown of charges and payments-

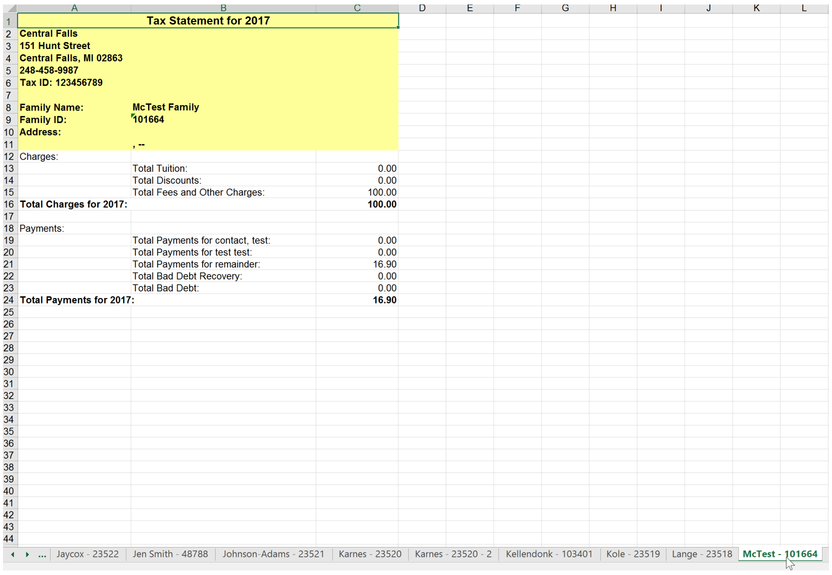


Central Falls
151 Hunt Street
Central Falls MI 02863
248-458-9987
Tax ID: 123456789

McTest Family
Family ID: 101664
, --

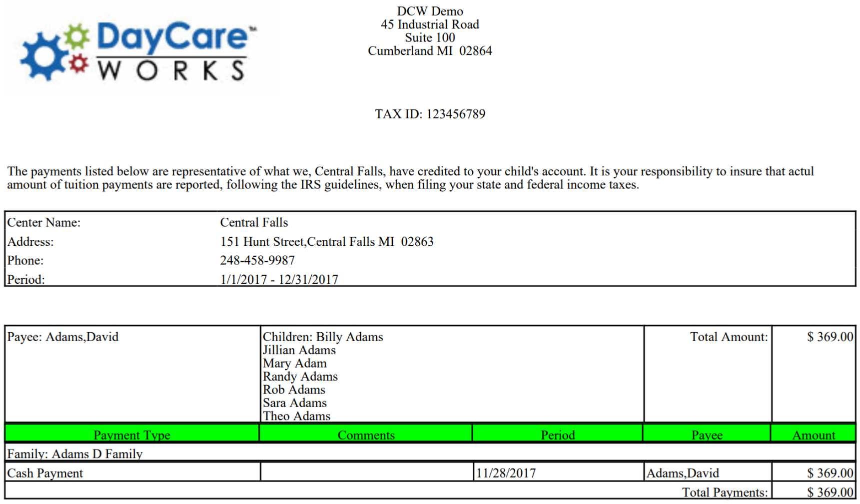
Charges:		
	Total Tuition:	0.00
	Total Discounts:	0.00
	Total Fees and Other Charges:	100.00
Total Charges for 2017:		**100.00**
Payments:		
	Total Payments for contact, test:	0.00
	Total Payments for test test:	0.00
	Total Payments for remainder:	16.90
	Total Bad Debt Recovery:	0.00
	Total Bad Debt:	0.00
Total Payments for 2017:		**16.90**

- Tax Statement- Excel-displays a breakdown of charges and payments-



	A	B	C
1	**Tax Statement for 2017**		
2	**Central Falls**		
3	**151 Hunt Street**		
4	**Central Falls, MI 02863**		
5	**248-458-9987**		
6	**Tax ID: 123456789**		
7			
8	**Family Name:**	**McTest Family**	
9	**Family ID:**	**101664**	
10	**Address:**		
11		**, --**	
12	Charges:		
13		Total Tuition:	0.00
14		Total Discounts:	0.00
15		Total Fees and Other Charges:	100.00
16	**Total Charges for 2017:**		**100.00**
17			
18	Payments:		
19		Total Payments for contact, test:	0.00
20		Total Payments for test test:	0.00
21		Total Payments for remainder:	16.90
22		Total Bad Debt Recovery:	0.00
23		Total Bad Debt:	0.00
24	**Total Payments for 2017:**		**16.90**

- Multi-Payer Tax Statement- PDF- a basic statement broken down by payer for split families



DCW Demo
45 Industrial Road
Suite 100
Cumberland MI 02864

TAX ID: 123456789

The payments listed below are representative of what we, Central Falls, have credited to your child's account. It is your responsibility to insure that actul amount of tuition payments are reported, following the IRS guidelines, when filing your state and federal income taxes.

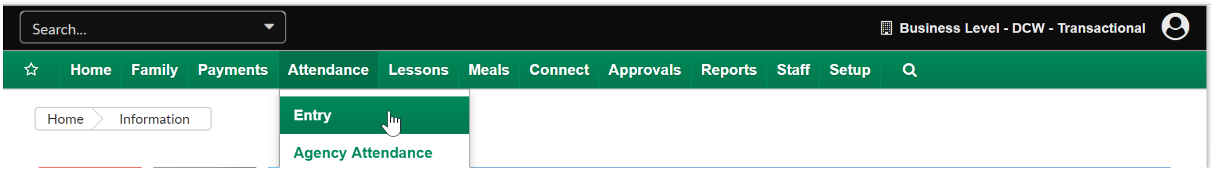
Center Name:	Central Falls
Address:	151 Hunt Street,Central Falls MI 02863
Phone:	248-458-9987
Period:	1/1/2017 - 12/31/2017

Payee: Adams,David	Children: Billy Adams Jillian Adams Mary Adam Randy Adams Rob Adams Sara Adams Theo Adams		Total Amount:	$ 369.00
Payment Type	Comments	Period	Payee	Amount
Family: Adams D Family				
Cash Payment		11/28/2017	Adams,David	$ 369.00
			Total Payments:	$ 369.00

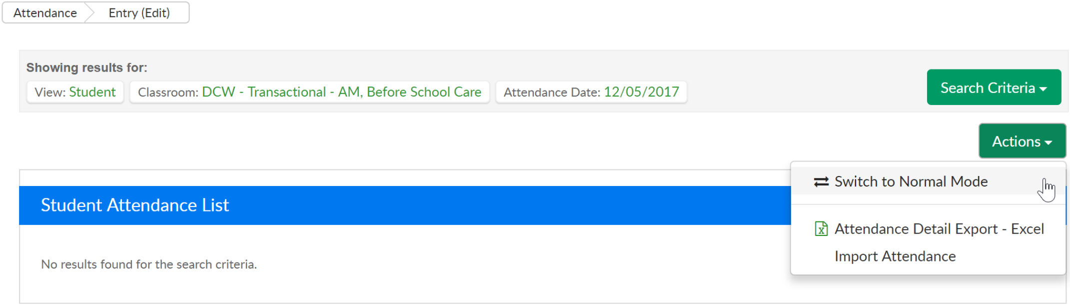
Attendance > Entry

Last Modified on 05/11/2018 1:33 pm EDT

The Attendance > Entry screen is where users will be able to check in children or staff from the web side, alter attendance records and review historical check-ins/outs by day.



The system offers different methods for administrators to record the attendance for the center. To switch between attendance modes select the action drop down menu- then select the "Switch To" option.



Showing results for:
View: Student
Classroom: DCW - Transactional - AM, Before School Care
Attendance Date: 12/05/2017

No results found for the search criteria.

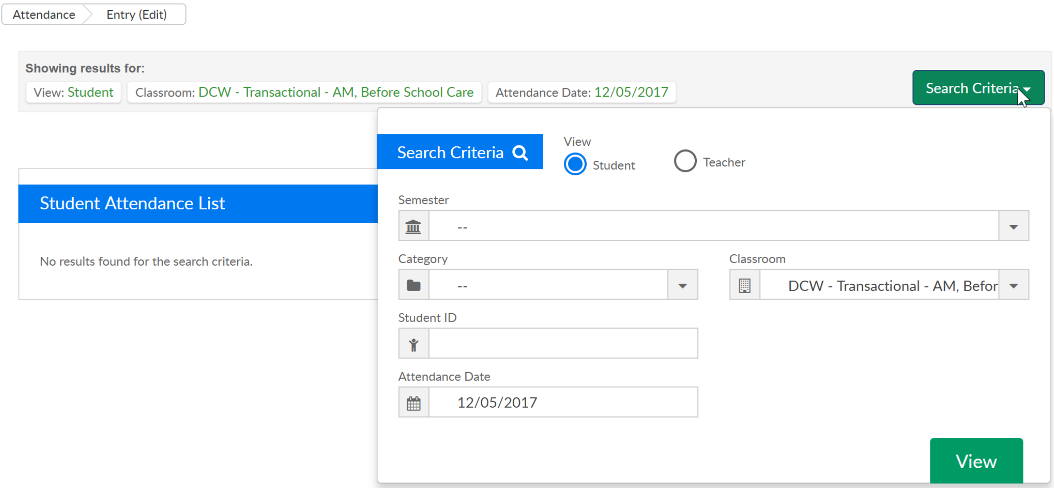
- The **Normal Mode** attendance section allows an administrator to check a child into a center or out of a center as the child enters or exits the center. It is similar to using the touchscreen application to check a child in or out of the center.
- The **Edit Mode** attendance section allows an administrator to enter the time a child entered or exited the center. This can be used to record when a child entered a center as it happens, or at the end of the day.

To take or view attendance select the Search Criteria button and enter the detail for the children that should display-

- Semester
- Category- select a category to pull a larger grouping of children (than just classroom)
- Classroom- select a specific room or select Show All to display all expected children
- Student ID- enter a student ID to pull just one student's attendance detail for the

selected day

- Attendance Date- the day's attendance that should be displayed



Showing results for:
View: Student
Classroom: DCW - Transactional - AM, Before School Care
Attendance Date: 12/05/2017

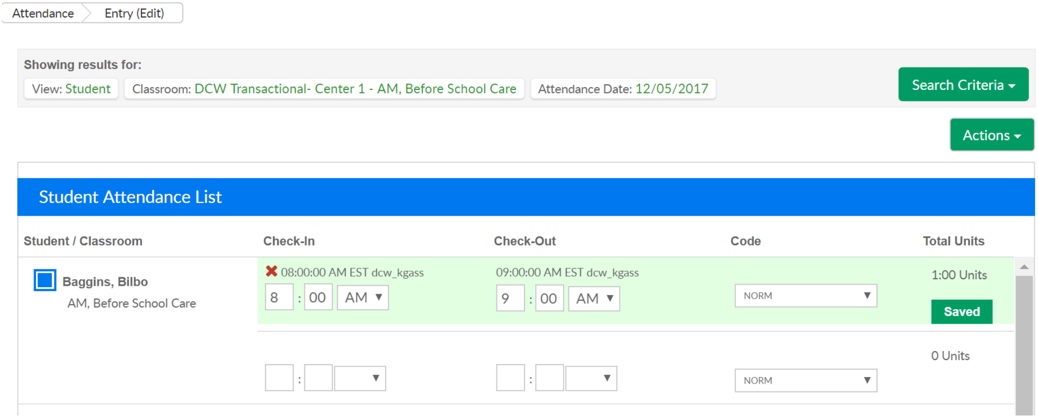
No results found for the search criteria.

View: ● Student ○ Teacher
Semester: --
Category: --
Classroom: DCW - Transactional - AM, Befor
Student ID:
Attendance Date: 12/05/2017

After selecting View, children will display.

In **edit mode** enter the check in or out time for each child, as times are entered tab over- the record will save automatically. When a check-in/out is completed a new line will display below the record in case the child is checking in/out again within the same room/day.

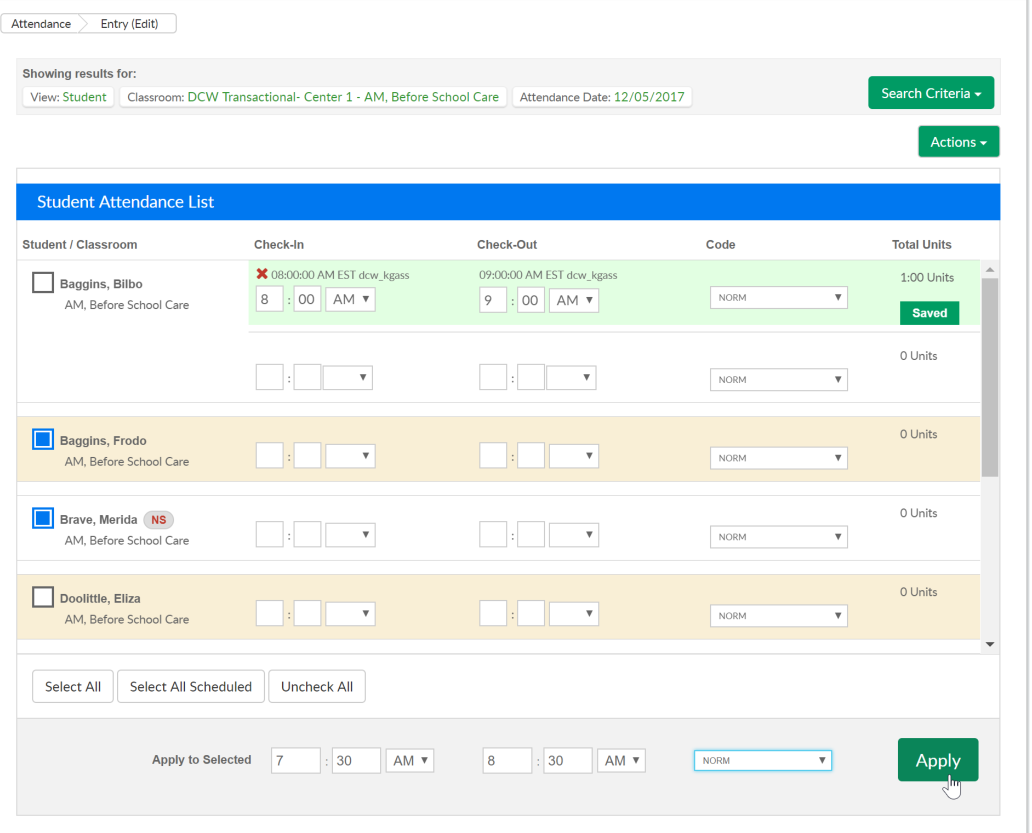
If an entry needs to be changed or deleted this is the view the user would be able to make changes in, select the red x to delete a check in/out or click into the time fields and update as needed. Each time a new piece of data is entered press tab to be sure the detail is saved.



Showing results for:
View: Student
Classroom: DCW Transactional- Center 1 - AM, Before School Care
Attendance Date: 12/05/2017

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ Baggins, Bilbo AM, Before School Care	✖ 08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units
	:	:	NORM	0 Units

To add detail for multiple children at once, select the square to the left of the child's name, then go to the apply all selected area and enter times.



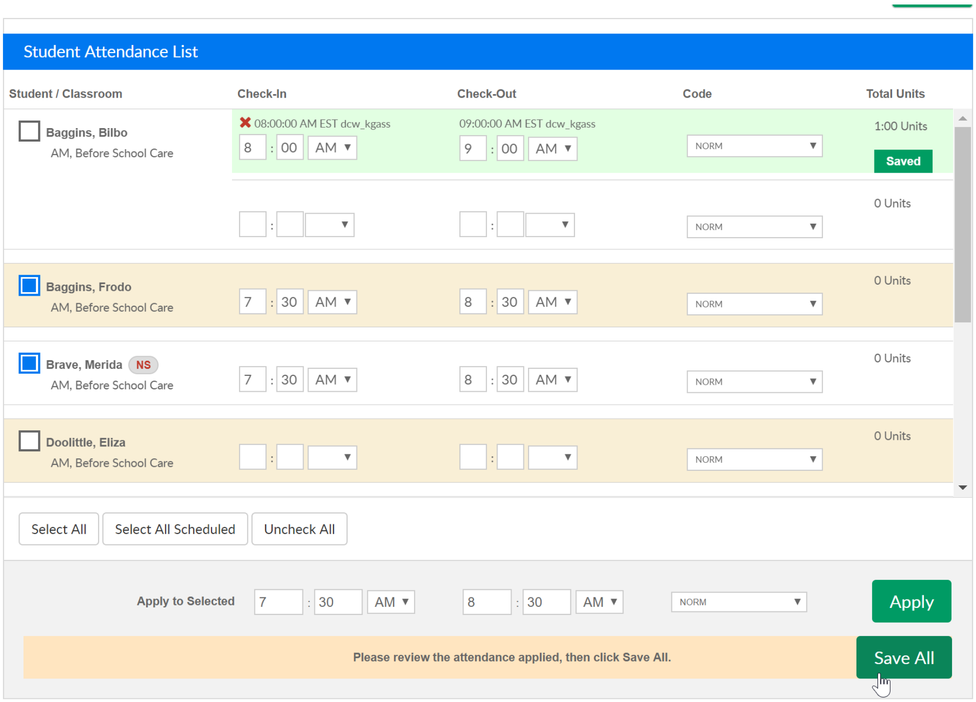
Showing results for:
View: Student | Classroom: DCW Transactional- Center 1 - AM, Before School Care | Attendance Date: 12/05/2017

Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ **Baggins, Bilbo** AM, Before School Care	✗ 08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Baggins, Frodo** AM, Before School Care	:	:	NORM	0 Units
☑ **Brave, Merida** NS AM, Before School Care	:	:	NORM	0 Units
☐ **Doolittle, Eliza** AM, Before School Care	:	:	NORM	0 Units

Apply to Selected 7 : 30 AM 8 : 30 AM NORM

Once times are entered click apply to apply the times to the selected children, then click Save All.



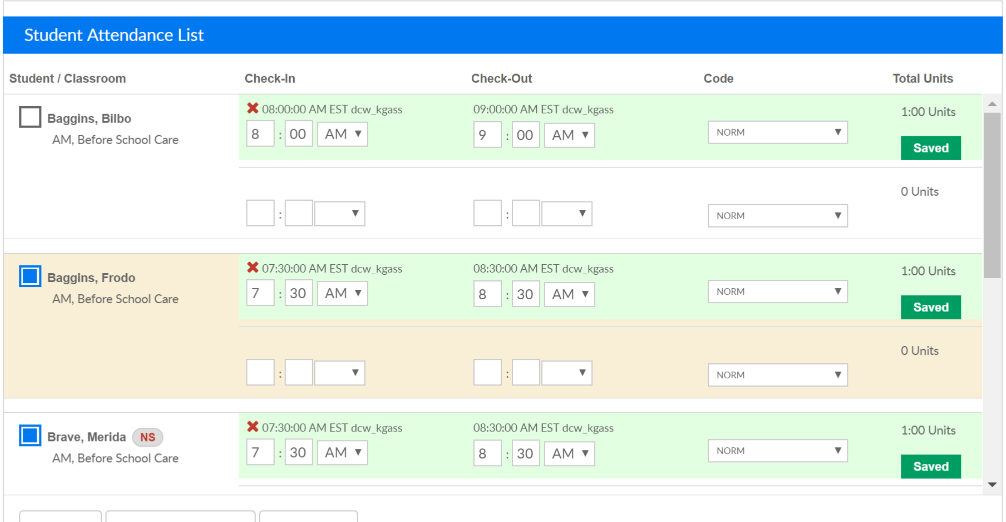
Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ **Baggins, Bilbo** AM, Before School Care	✗ 08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Baggins, Frodo** AM, Before School Care	7 : 30 AM	8 : 30 AM	NORM	0 Units
☑ **Brave, Merida** NS AM, Before School Care	7 : 30 AM	8 : 30 AM	NORM	0 Units
☐ **Doolittle, Eliza** AM, Before School Care	:	:	NORM	0 Units

Apply to Selected 7 : 30 AM 8 : 30 AM NORM

Please review the attendance applied, then click Save All.

Once the fields turn green, the records have been saved.



Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ **Baggins, Bilbo** AM, Before School Care	✖ 08:00:00 AM EST dcw_kgass 8 : 00 AM	09:00:00 AM EST dcw_kgass 9 : 00 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Baggins, Frodo** AM, Before School Care	✖ 07:30:00 AM EST dcw_kgass 7 : 30 AM	08:30:00 AM EST dcw_kgass 8 : 30 AM	NORM	1:00 Units Saved
	:	:	NORM	0 Units
☑ **Brave, Merida** NS AM, Before School Care	✖ 07:30:00 AM EST dcw_kgass 7 : 30 AM	08:30:00 AM EST dcw_kgass 8 : 30 AM	NORM	1:00 Units Saved

To see attendance over a period of time go to reports > room/program and pull one of the below reports- be sure you enter a date range and select the data you want to see by center, category or room!

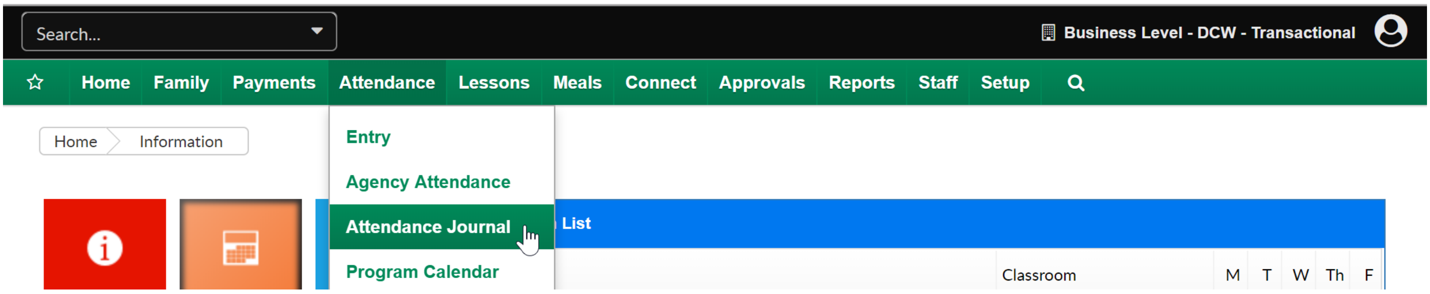
- Reports > Room/Program, Attendance- Child Attendance Detail - Excel
- Reports > Room/Program, Attendance- Site Summary Attendance - Excel

Attendance > Attendance Journal

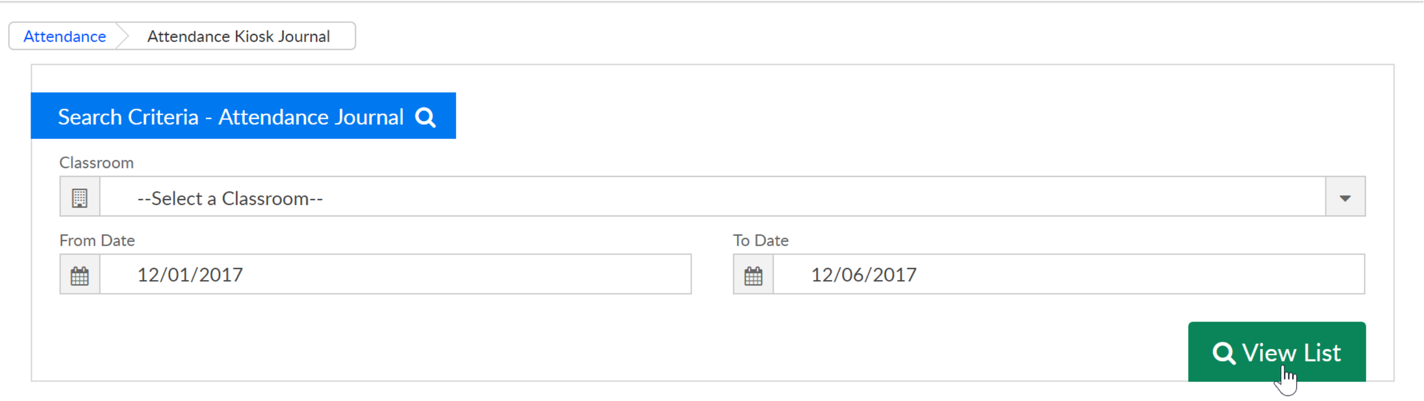
Last Modified on 03/30/2018 8:39 am EDT

The Attendance Journal-page will display all check-ins and outs. This is a helpful place to come if an error is received while checking a child in our out from the InSite Select or InSite Provider Applications.

From the Attendance, menu select the Attendance Journal option.



Once on the screen select the Classroom you want to see attendance for, a from date and a to date. (Classroom is optional if a user wants to see detail for the business level or a particular center level- depending on what level of the system the user is currently on.)



Classroom: --Select a Classroom--

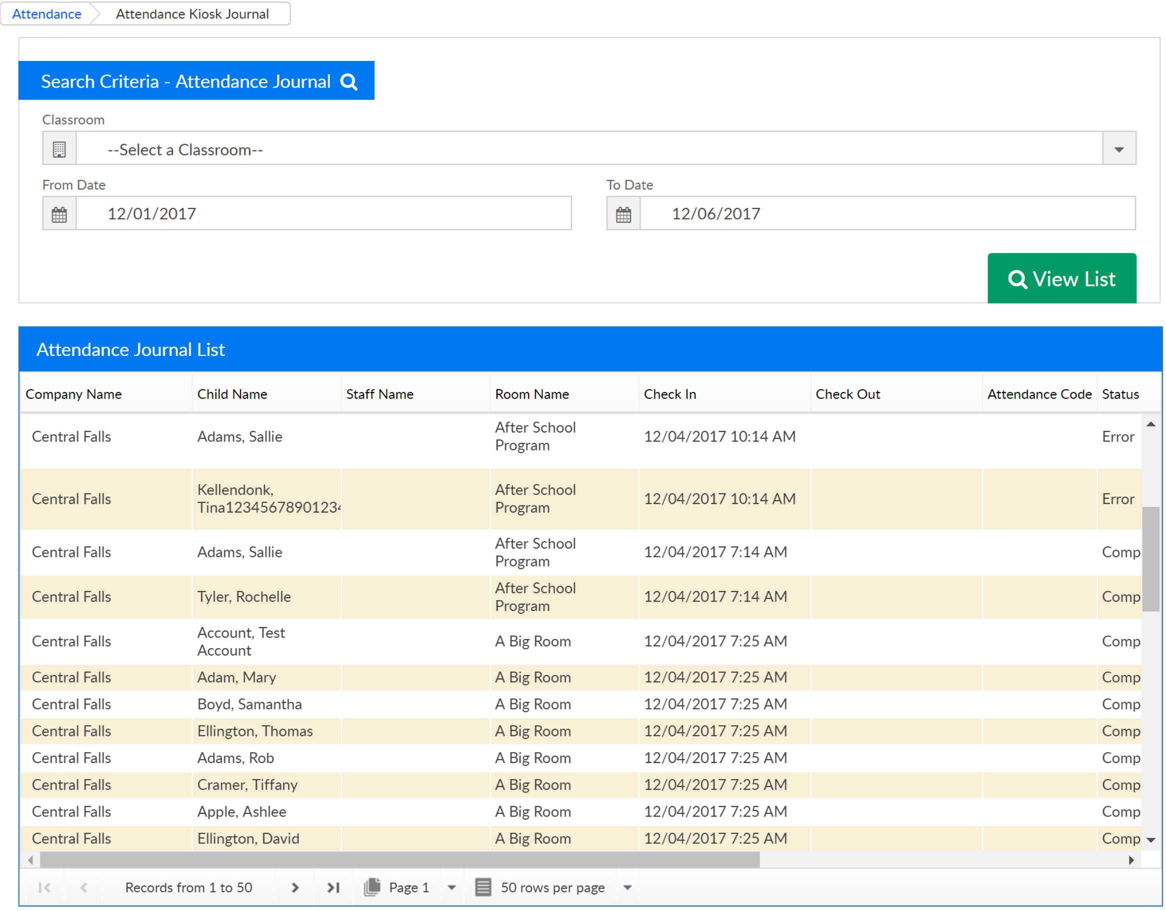
From Date: 12/01/2017

To Date: 12/06/2017

The Attendance Journal list will display once View List has been selected.   In this table, the below data will display-

- Company Name- Site/Center/School Name
- Child Name
- Staff Name- who checked the child in/out
- Room Name
- Check-In
- Check Out

- Attendance Code- the type of attendance (set on the admin side)
- Status
  - Error- attendance did not process
  - Complete- attendance has been recorded
- Kiosk Date- date the attendance was entered
- Process Date- date the attendance was processed
- Reason- the cause of the error
  - Check-in date cannot be in the future
  - Attendance check-in record has been skipped. An existing check-in without checkout exists



Classroom: --Select a Classroom--

From Date: 12/01/2017

To Date: 12/06/2017

Company Name	Child Name	Staff Name	Room Name	Check In	Check Out	Attendance Code	Status
Central Falls	Adams, Sallie		After School Program	12/04/2017 10:14 AM			Error
Central Falls	Kellendonk, Tina1234567890123		After School Program	12/04/2017 10:14 AM			Error
Central Falls	Adams, Sallie		After School Program	12/04/2017 7:14 AM			Comp
Central Falls	Tyler, Rochelle		After School Program	12/04/2017 7:14 AM			Comp
Central Falls	Account, Test Account		A Big Room	12/04/2017 7:25 AM			Comp
Central Falls	Adam, Mary		A Big Room	12/04/2017 7:25 AM			Comp
Central Falls	Boyd, Samantha		A Big Room	12/04/2017 7:25 AM			Comp
Central Falls	Ellington, Thomas		A Big Room	12/04/2017 7:25 AM			Comp
Central Falls	Adams, Rob		A Big Room	12/04/2017 7:25 AM			Comp
Central Falls	Cramer, Tiffany		A Big Room	12/04/2017 7:25 AM			Comp
Central Falls	Apple, Ashlee		A Big Room	12/04/2017 7:25 AM			Comp
Central Falls	Ellington, David		A Big Room	12/04/2017 7:25 AM			Comp

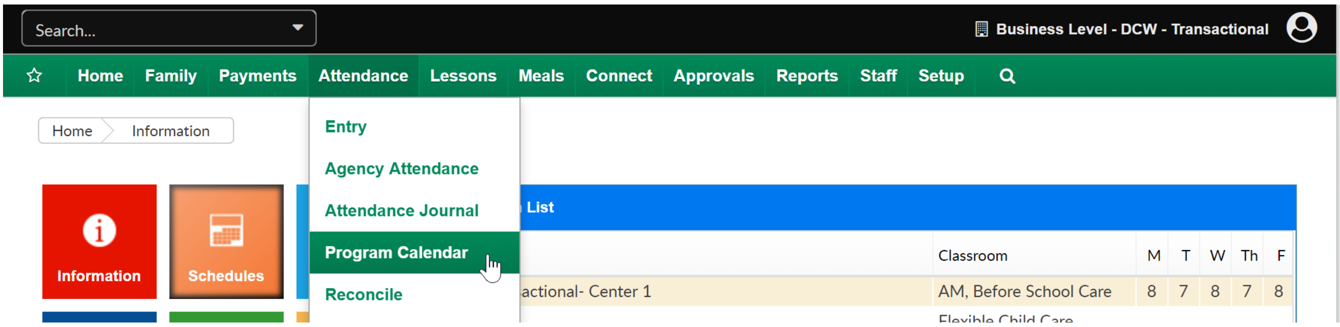
From this page, a user may want to edit attendance that has been entered by going to the attendance > entry page or pull attendance reporting for a particular date or date range-reports > room/program, child attendance detail .

Attendance > Program Calendar

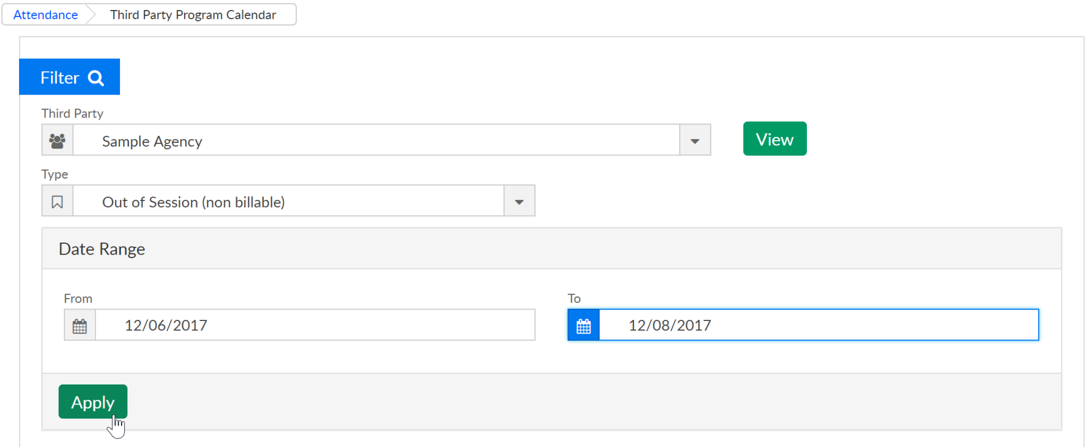
Last Modified on 03/30/2018 8:39 am EDT

The Attendance > Program Calendar screen will allow an admin to enter days that are In Session (Billable), Out of Session (non-billable) or In Session (non-billable) on a calendar for agencies/third parties. This will tie to how an agency's attendance or schedule days are billed.

From the Attendance drop down menu select Program Calendar-



To add a day to the calendar select the third party, choose the type of billing for the time frame and then add the dates to and from. Select Apply.



Third Party: Sample Agency

Type: Out of Session (non billable)

From: 12/06/2017

To: 12/08/2017

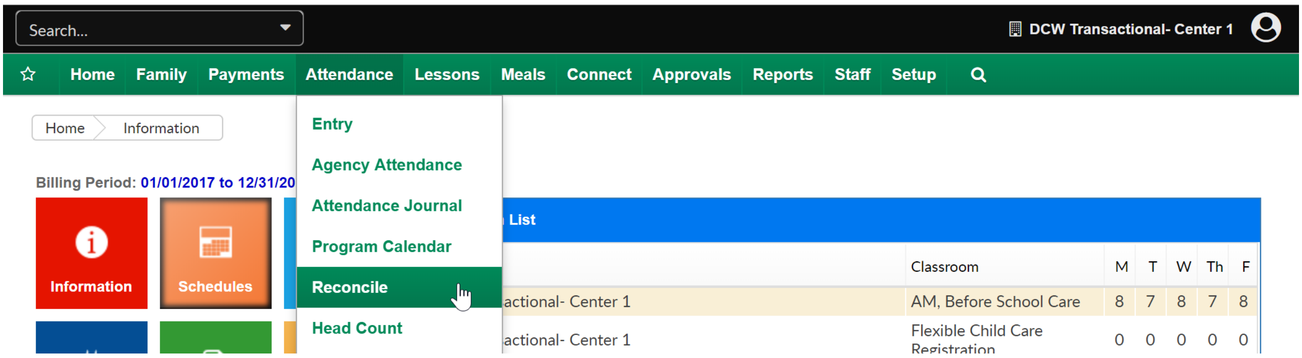
Note: In order to use this screen the option on third party setup to allow a Allow Flexible Schedule and Allow Program Calendar must be set to yes.

Attendance > Reconcile

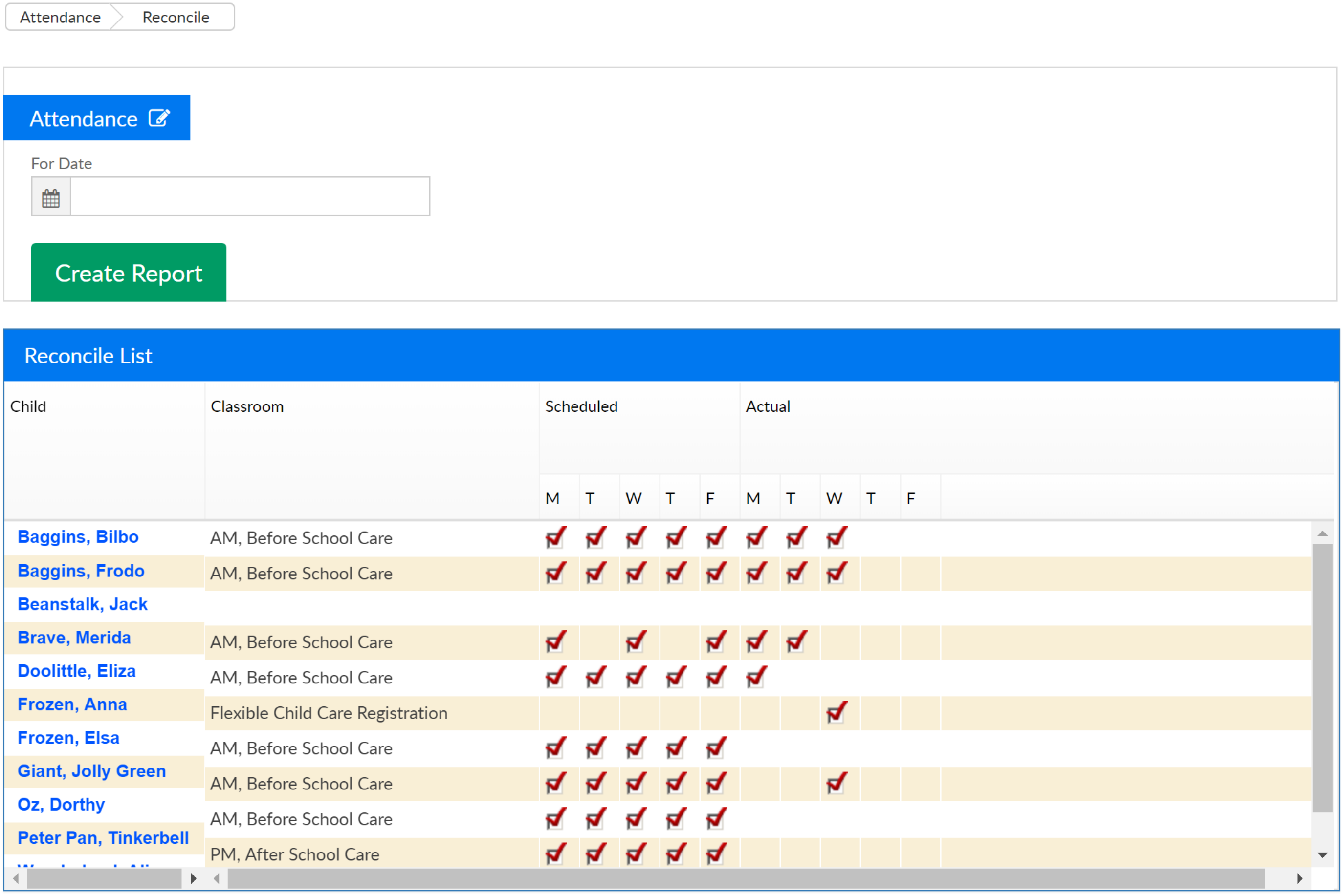
Last Modified on 03/30/2018 8:44 am EDT

The Attendance > Reconcile page will display expected vs actual attendance for a site. This page will only display for a center or site level, data will not display at the business level.

From the Attendance, list select the Reconcile option.



On the reconcile screen the day's detail will display as a default. To select a specific day to enter a date in the For Date field, then press Create Report.



For Date

Child	Classroom	Scheduled					Actual				
		M	T	W	T	F	M	T	W	T	F
Baggins, Bilbo	AM, Before School Care	✓	✓	✓	✓	✓	✓	✓	✓		
Baggins, Frodo	AM, Before School Care	✓	✓	✓	✓	✓	✓	✓	✓		
Beanstalk, Jack											
Brave, Merida	AM, Before School Care	✓		✓		✓	✓	✓			
Doolittle, Eliza	AM, Before School Care	✓	✓	✓	✓	✓	✓				
Frozen, Anna	Flexible Child Care Registration								✓		
Frozen, Elsa	AM, Before School Care	✓	✓	✓	✓	✓					
Giant, Jolly Green	AM, Before School Care	✓	✓	✓	✓	✓			✓		
Oz, Dorthy	AM, Before School Care	✓	✓	✓	✓	✓					
Peter Pan, Tinkerbell	PM, After School Care	✓	✓	✓	✓	✓					

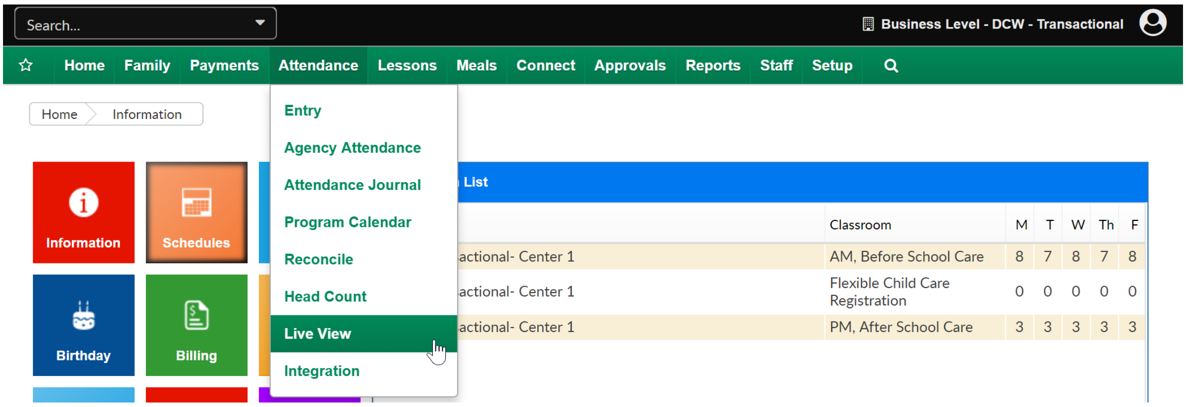
If schedules need to be altered go to the child's program/room assignment and edit as needed. If attendance needs to be updated go to attendance > entry, then select edit mode- make updates as needed.

Attendance > Live View

Last Modified on 03/30/2018 8:44 am EDT

The Live View screen will allow admin users to see staff and students in attendance for ratio purposes. This screen will also allow admins to transfer students/children and staff between rooms to meet ratio needs.

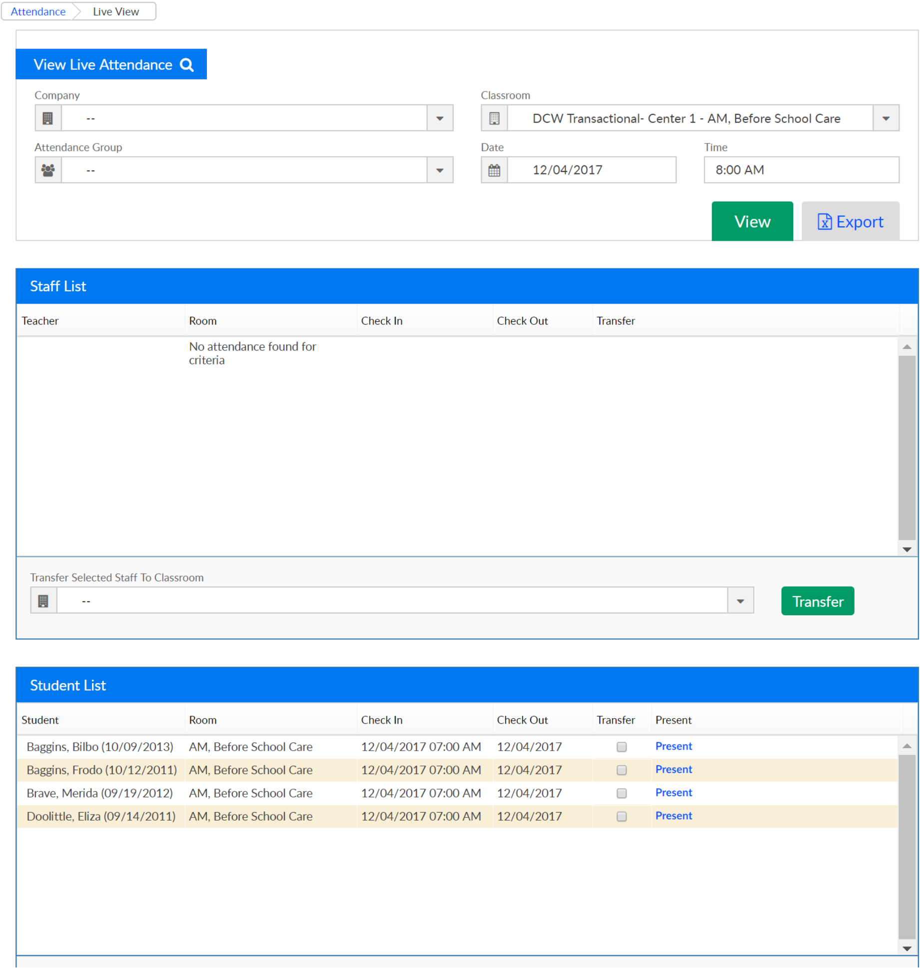
From the Attendance, menu select the Live View option.



On the Live View, screen select the Company, Classroom or Attendance Group that will display.

- The top section under Staff List will display teachers that were checked in to the room on the date and time specified.
- The second section Student List will display children that were checked in to the room on the date and time specified in the search criteria.

To export the results of the search press the Export option next to the view button.



Company: --

Classroom: DCW Transactional- Center 1 - AM, Before School Care

Attendance Group: --

Date: 12/04/2017

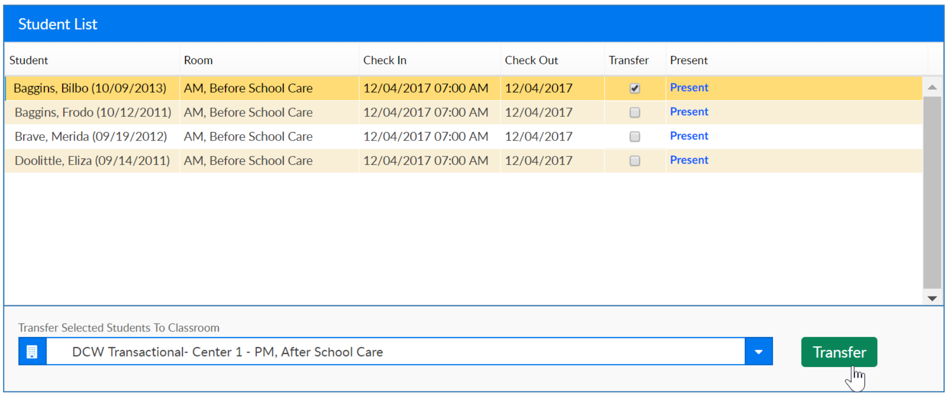
Time: 8:00 AM

Teacher	Room	Check In	Check Out	Transfer
	No attendance found for criteria			

Transfer Selected Staff To Classroom: --

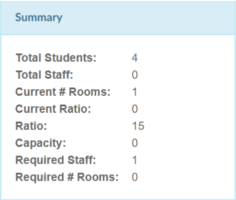
Student	Room	Check In	Check Out	Transfer	Present
Baggins, Bilbo (10/09/2013)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☐	Present
Baggins, Frodo (10/12/2011)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☐	Present
Brave, Merida (09/19/2012)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☐	Present
Doolittle, Eliza (09/14/2011)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☐	Present

To transfer students or staff between rooms select the checkbox next to their name under the transfer column, then select the room to transfer the child(ren) to. Once selected press Transfer- transfers can only be done in real time.



Student	Room	Check In	Check Out	Transfer	Present
Baggins, Bilbo (10/09/2013)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☑	Present
Baggins, Frodo (10/12/2011)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☐	Present
Brave, Merida (09/19/2012)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☐	Present
Doolittle, Eliza (09/14/2011)	AM, Before School Care	12/04/2017 07:00 AM	12/04/2017	☐	Present

Transfer Selected Students To Classroom: DCW Transactional- Center 1 - PM, After School Care



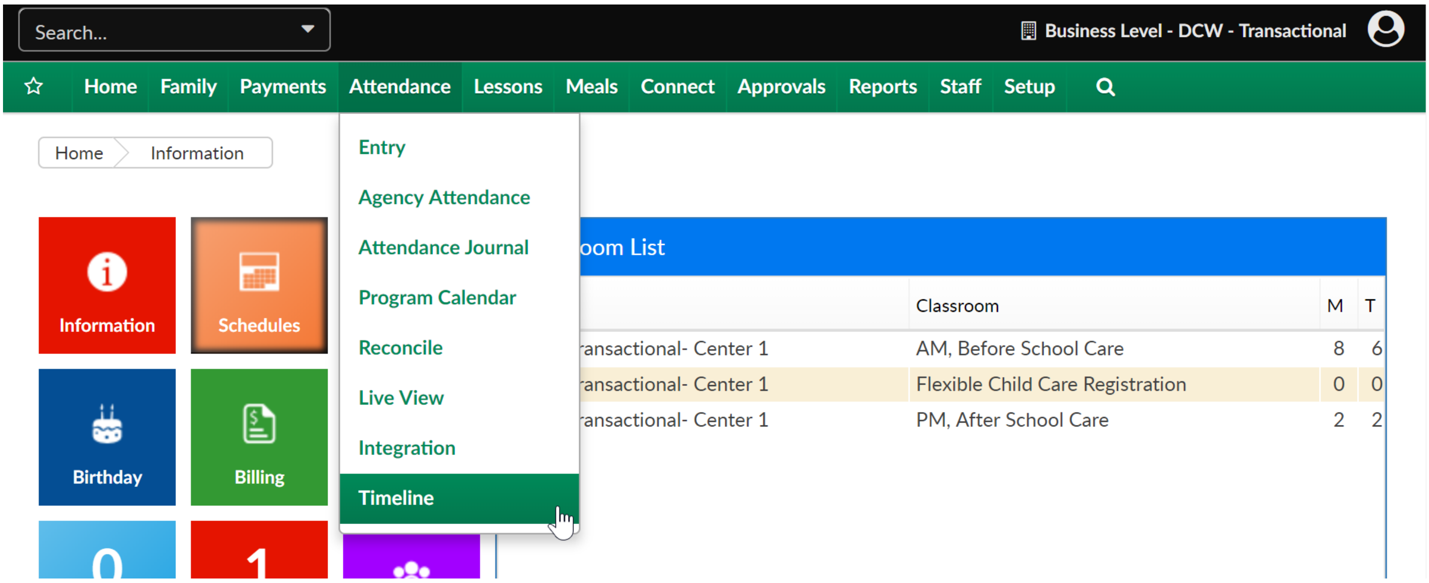
Total Students:	4
Total Staff:	0
Current # Rooms:	1
Current Ratio:	0
Ratio:	15
Capacity:	0
Required Staff:	1
Required # Rooms:	0

Attendance > Timeline

Last Modified on 05/23/2018 9:44 am EDT

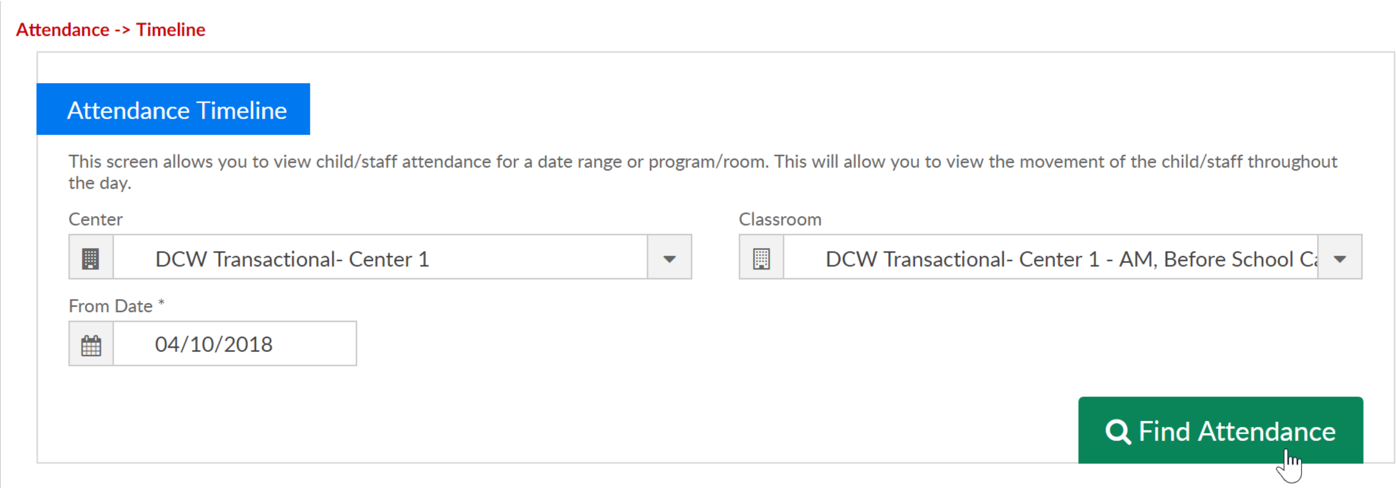
The Timeline option on the Attendance menu will display children's movements from room to room within a time period.

From the Attendance menu option, select Timeline-



	Classroom	M	T
ansactional- Center 1	AM, Before School Care	8	6
ansactional- Center 1	Flexible Child Care Registration	0	0
ansactional- Center 1	PM, After School Care	2	2

Select the center from the drop down list, classroom and date that should be viewed-



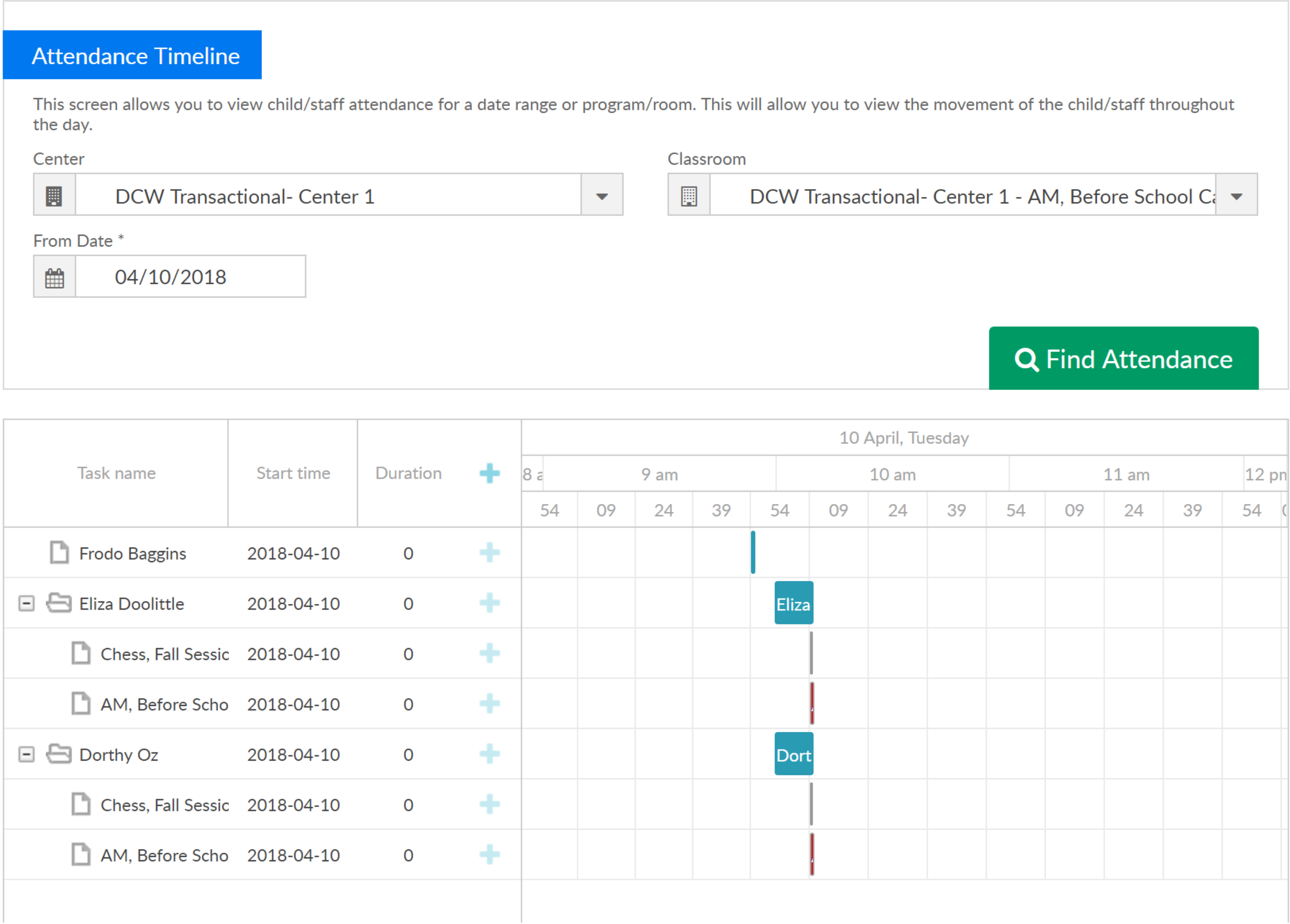
This screen allows you to view child/staff attendance for a date range or program/room. This will allow you to view the movement of the child/staff throughout the day.

Center: DCW Transactional- Center 1

Classroom: DCW Transactional- Center 1 - AM, Before School Ca

From Date *: 04/10/2018

Results will display, if the child has moved throughout the day specific classrooms will also show. This screen is view only.



Attendance Timeline

This screen allows you to view child/staff attendance for a date range or program/room. This will allow you to view the movement of the child/staff throughout the day.

Center: DCW Transactional- Center 1

Classroom: DCW Transactional- Center 1 - AM, Before School Ca

From Date *: 04/10/2018

Task name	Start time	Duration
Frodo Baggins	2018-04-10	0
Eliza Doolittle	2018-04-10	0
Chess, Fall Sessic	2018-04-10	0
AM, Before Scho	2018-04-10	0
Dorthy Oz	2018-04-10	0
Chess, Fall Sessic	2018-04-10	0
AM, Before Scho	2018-04-10	0

A printable version of this information is available under Reports > Room/Program-Transition Report

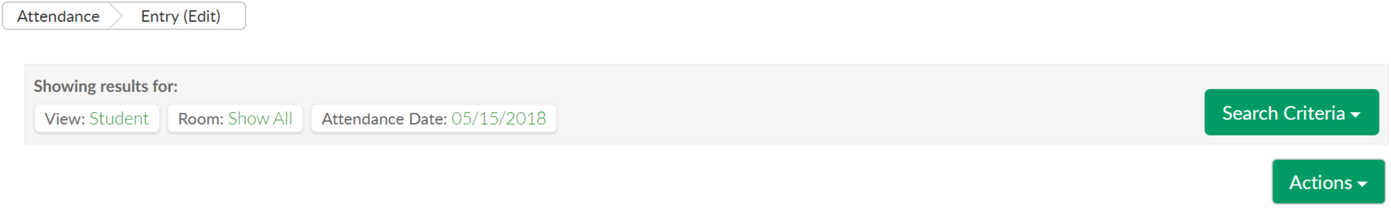
Taking Attendance- Best Practices

Last Modified on 05/15/2018 8:55 am EDT

Attendance can be added to the system several ways (the data will sync to the server so you should always have the most up to date detail when running reporting):

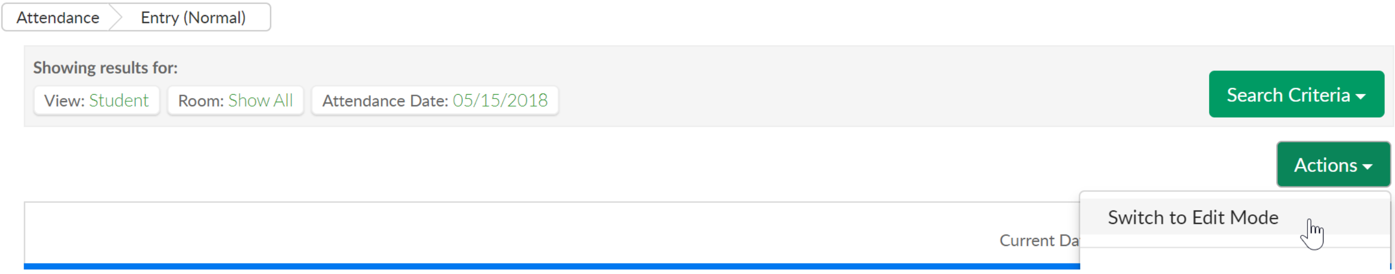
- Parents checking kids in/out by pin with the InSite Select application on a tablet
- Staff/Admins checking kids in/out with the InSite Provider application on a tablet
- Staff/Admins checking kids in/out through the teacher portal (https://connect.schoolcareworks.com/login.jsp or https://family.daycareworks.com/login.jsp)
- Staff/Admins checking kids in/out through the admin side of the site on the attendance > entry page (https://daycareworks.com/cg/secure_login.jsp or https://www.schoolcareworks.com/cg/secure_login.jsp)

Once attendance is in the system, any edits can be made by going to the aattendance > entry screen (make sure you are in edit mode!)



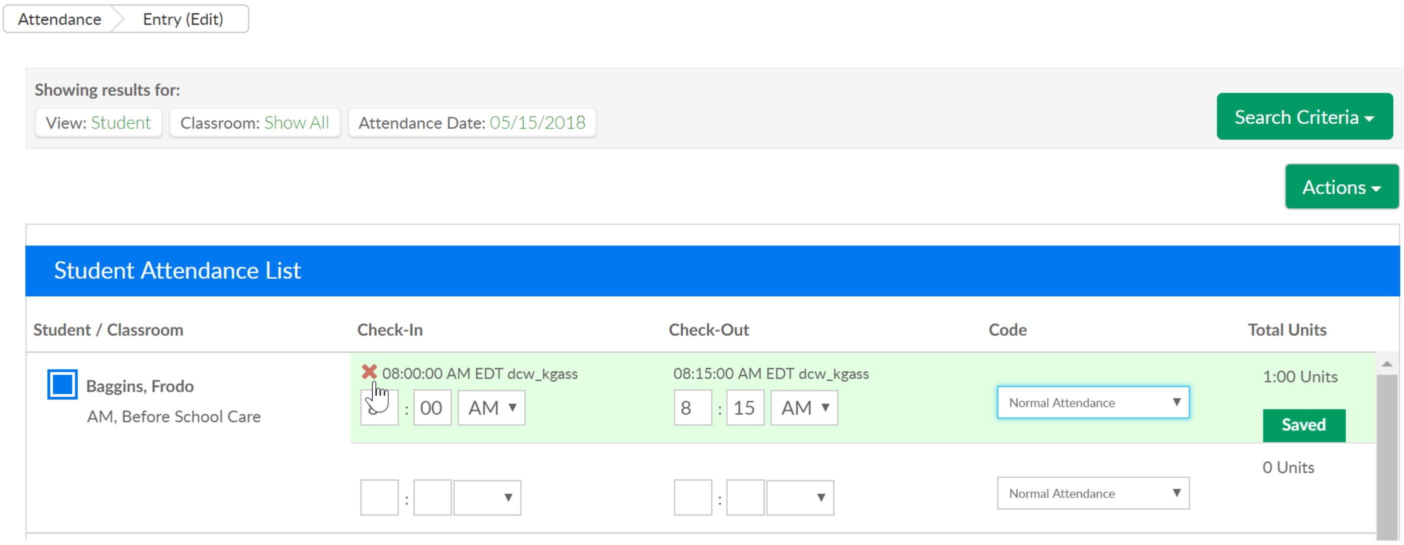
Showing results for:
View: Student | Room: Show All | Attendance Date: 05/15/2018

- If you need to switch to edit mode, go to actions and press Switch to Edit Mode:



Showing results for:
View: Student | Room: Show All | Attendance Date: 05/15/2018

From the edit mode screen you can delete attendance by selecting the red x above a record:

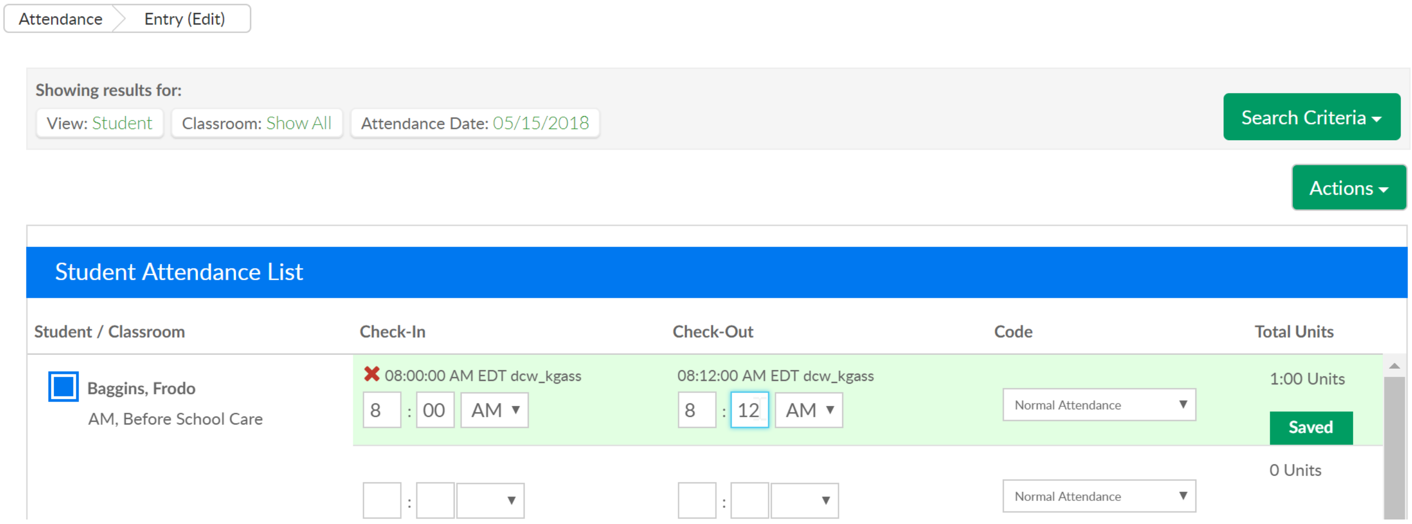


Showing results for:
View: Student | Classroom: Show All | Attendance Date: 05/15/2018

Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
Baggins, Frodo AM, Before School Care	08:00:00 AM EDT dcw_kgass : 00 AM	08:15:00 AM EDT dcw_kgass 8 : 15 AM	Normal Attendance	1:00 Units
			Normal Attendance	0 Units

Change the time a child was checked in/out by clicking into the field editing the time then press tab:



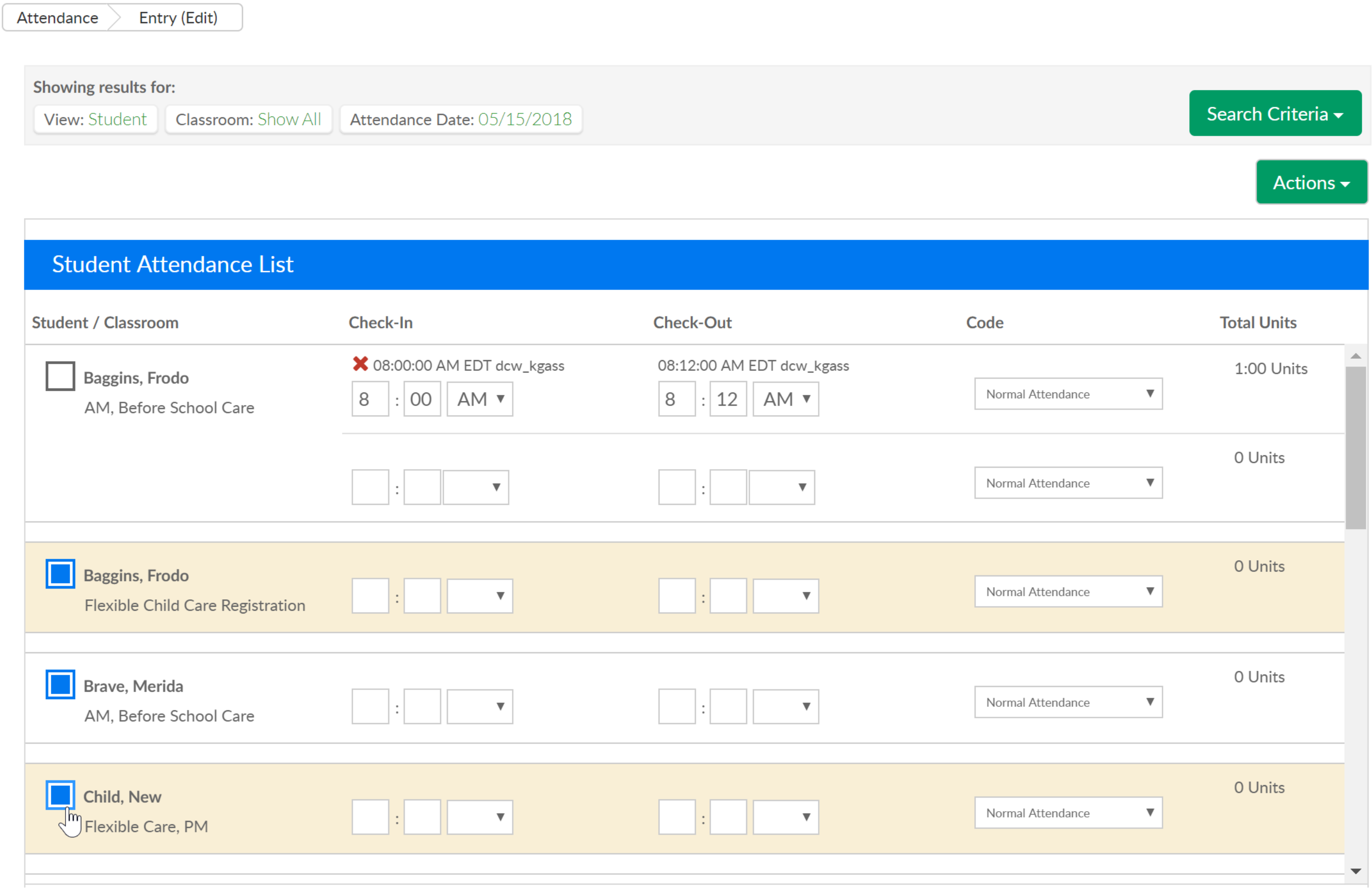
Showing results for:
View: Student | Classroom: Show All | Attendance Date: 05/15/2018

Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
Baggins, Frodo AM, Before School Care	08:00:00 AM EDT dcw_kgass 8 : 00 AM	08:12:00 AM EDT dcw_kgass 8 : 12 AM	Normal Attendance	1:00 Units
			Normal Attendance	0 Units

If time is being entered or changed, click into the field, then press tab. The screen will auto-save for you!

You can also mass check in/out children by selecting the box icon next to each child's name-



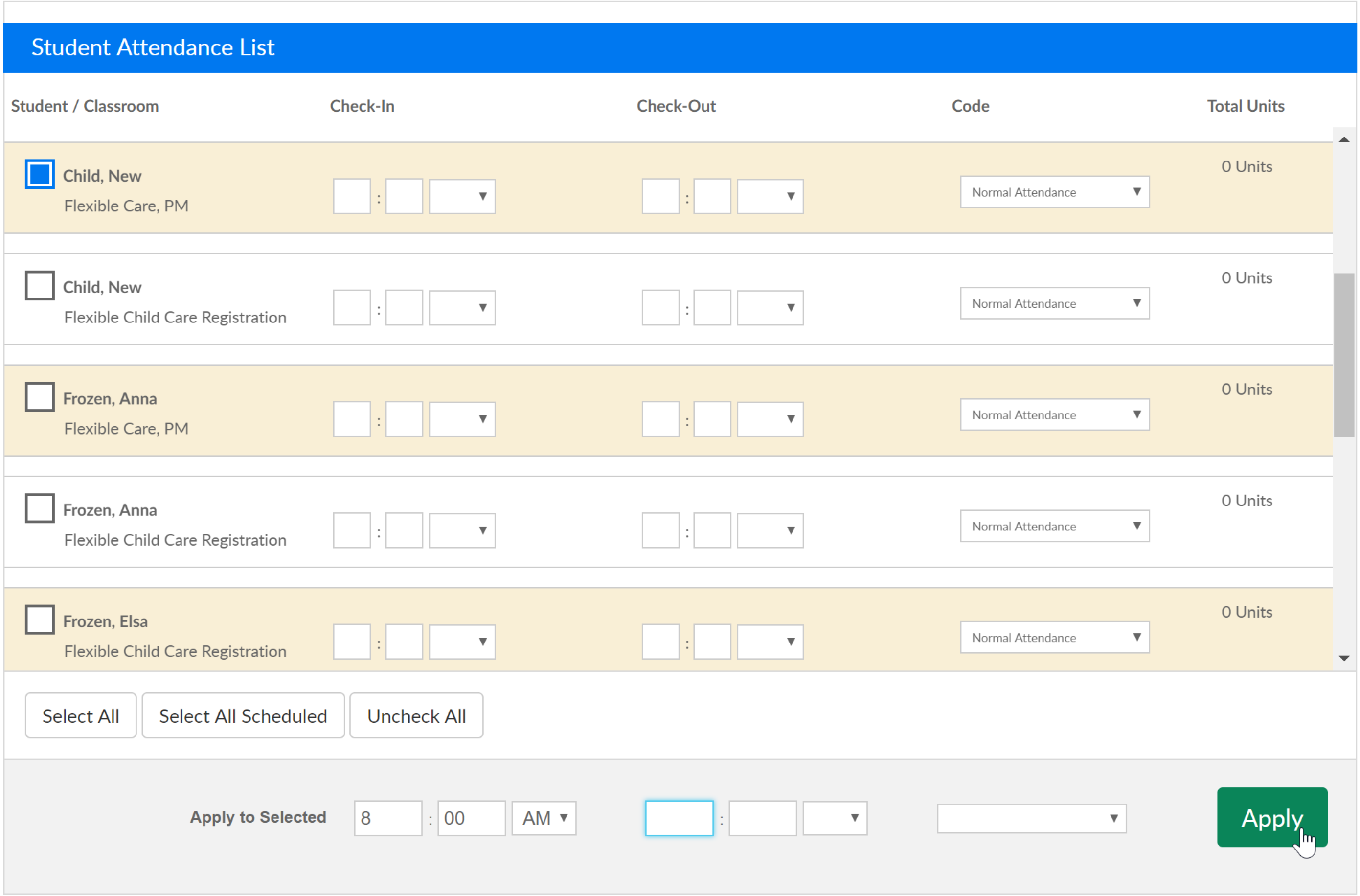
Showing results for:

View: Student | Classroom: Show All | Attendance Date: 05/15/2018

Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☐ **Baggins, Frodo** AM, Before School Care	08:00:00 AM EDT dcw_kgass 8 : 00 AM	08:12:00 AM EDT dcw_kgass 8 : 12 AM	Normal Attendance	1:00 Units
	:	:	Normal Attendance	0 Units
☑ **Baggins, Frodo** Flexible Child Care Registration	:	:	Normal Attendance	0 Units
☑ **Brave, Merida** AM, Before School Care	:	:	Normal Attendance	0 Units
☑ **Child, New** Flexible Care, PM	:	:	Normal Attendance	0 Units

Scroll to the apply to selected section and enter the check in, check out or the check in AND out times and press apply- remember children can only be checked in or out in the past- no FUTURE times!



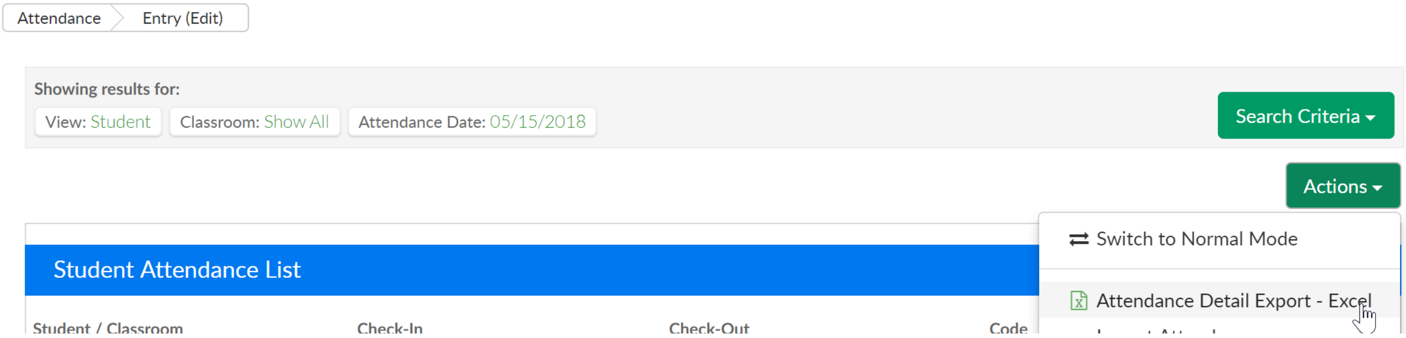
Student Attendance List

Student / Classroom	Check-In	Check-Out	Code	Total Units
☑ Child, New Flexible Care, PM	:	:	Normal Attendance	0 Units
☐ Child, New Flexible Child Care Registration	:	:	Normal Attendance	0 Units
☐ Frozen, Anna Flexible Care, PM	:	:	Normal Attendance	0 Units
☐ Frozen, Anna Flexible Child Care Registration	:	:	Normal Attendance	0 Units
☐ Frozen, Elsa Flexible Child Care Registration	:	:	Normal Attendance	0 Units

Apply to Selected: 8 : 00 AM

The time will be added to the selected students records, then press Save All.

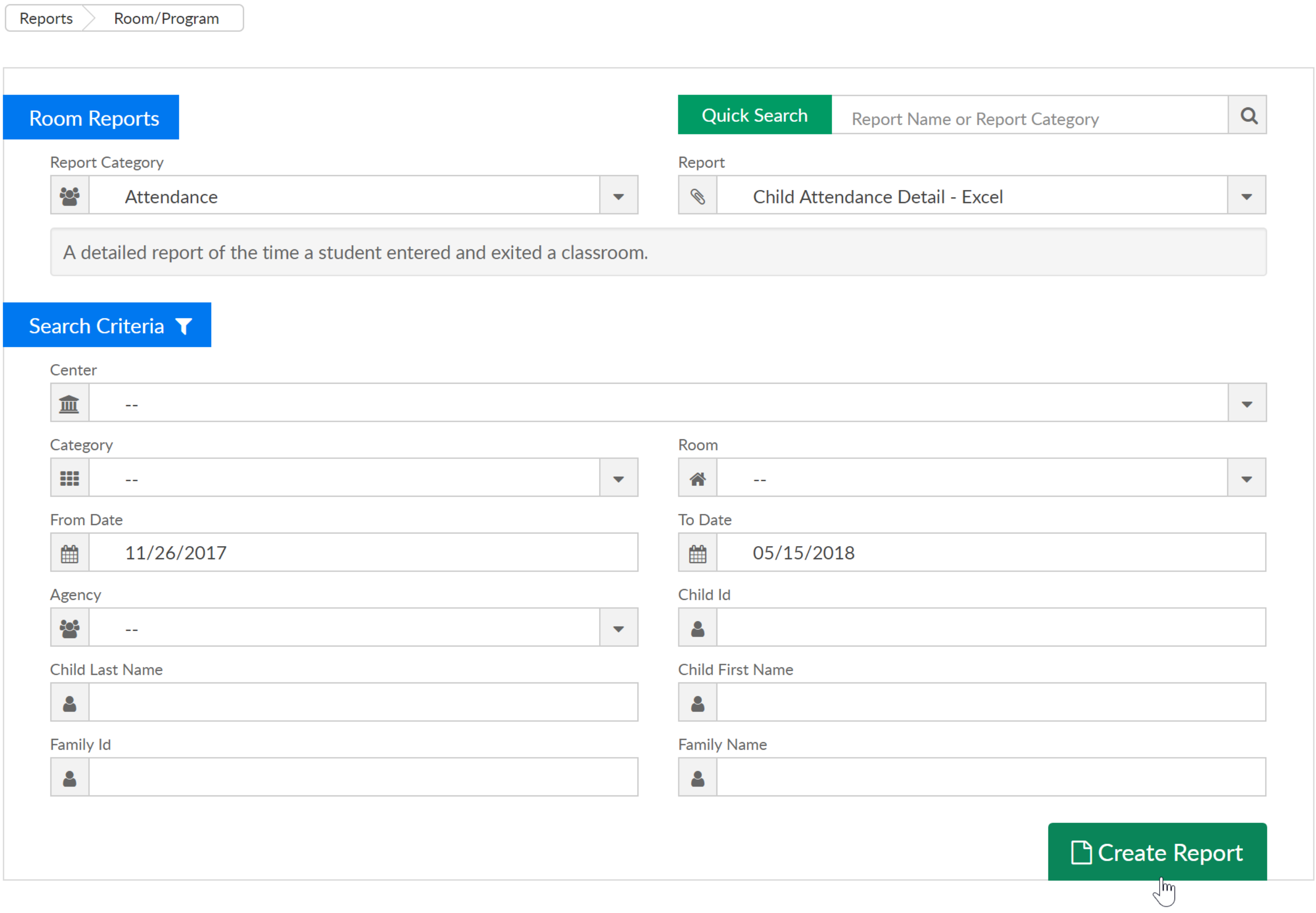
To pull a report that displays the day's attendance go to actions and select Attendance Detail Export- Excel



Showing results for:
View: Student
Classroom: Show All
Attendance Date: 05/15/2018

Probably more useful will be the ability to pull for a particular date range, child, classroom etc. For those reporting options go to reports > room/program:

Child Attendance Detail Excel or PDF-



Report Category: Attendance

Report: Child Attendance Detail - Excel

A detailed report of the time a student entered and exited a classroom.

Center: --

Category: --

Room: --

From Date: 11/26/2017

To Date: 05/15/2018

Agency: --

Child Id:

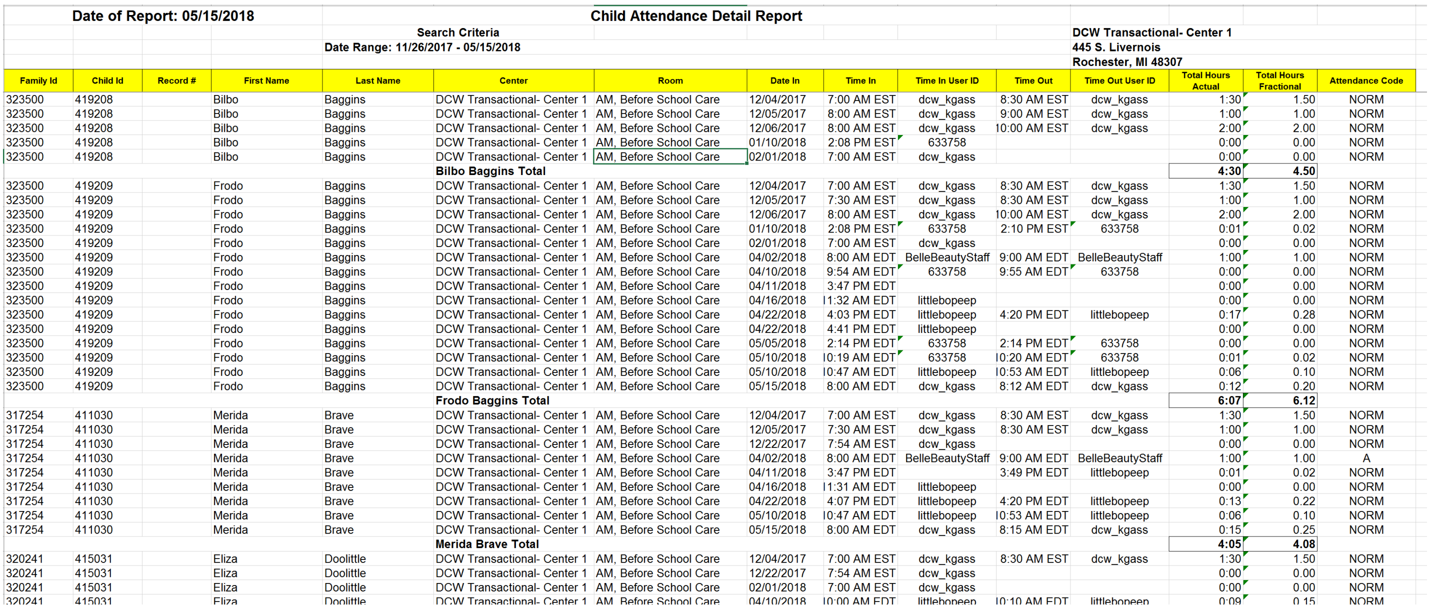
Child Last Name:

Child First Name:

Family Id:

Family Name:

Example:



Date of Report: 05/15/2018

Child Attendance Detail Report

Search Criteria

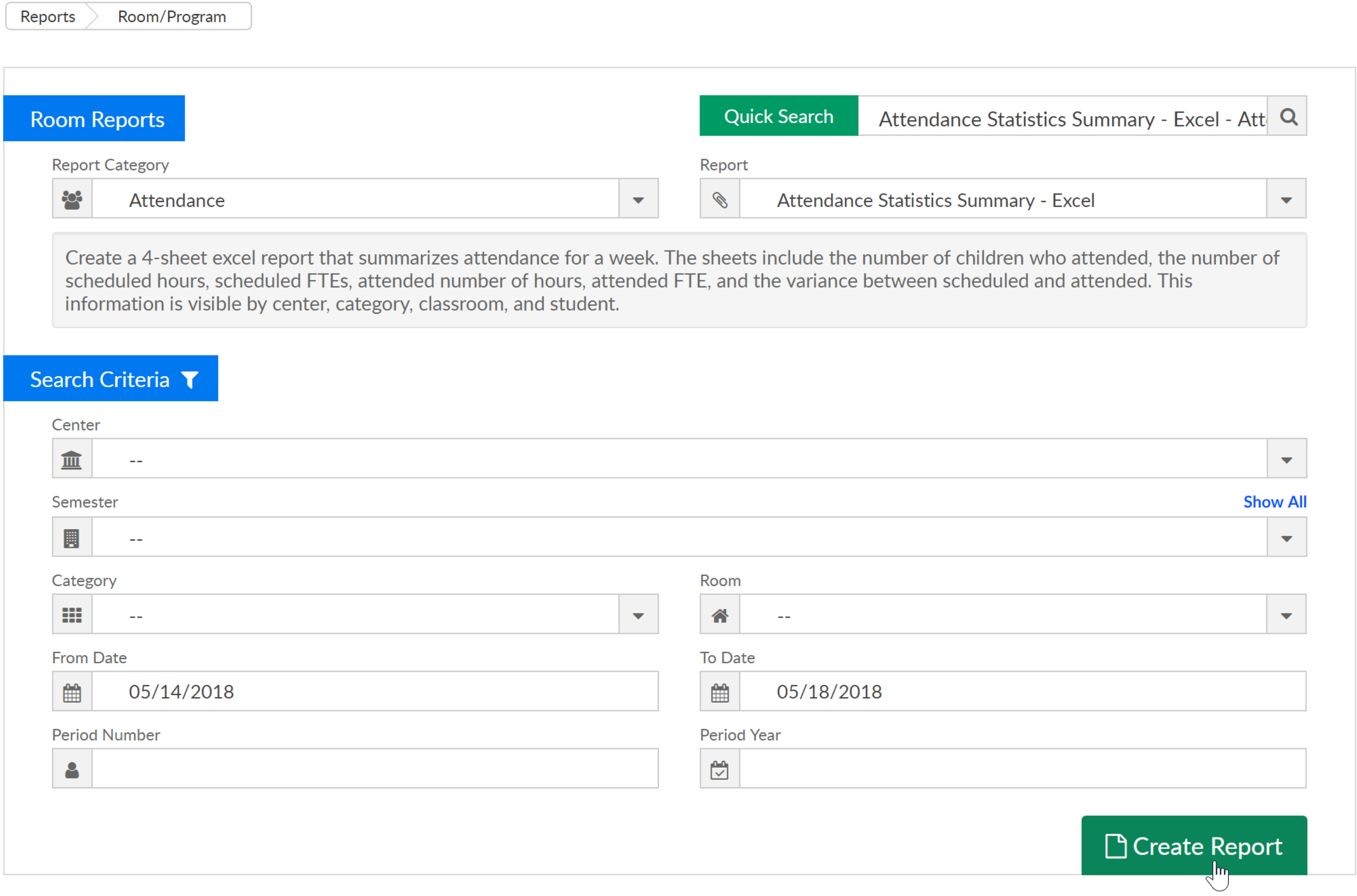
Date Range: 11/26/2017 - 05/15/2018

DCW Transactional- Center 1
445 S. Livernois
Rochester, MI 48307

Family Id	Child Id	Record #	First Name	Last Name	Center	Room	Date In	Time In	Time In User ID	Time Out	Time Out User ID	Total Hours Actual	Total Hours Fractional	Attendance Code
323500	419208		Bilbo	Baggins	DCW Transactional- Center 1	AM, Before School Care	12/04/2017	7:00 AM EST	dcw_kgass	8:30 AM EST	dcw_kgass	1:30	1.50	NORM
323500	419208		Bilbo	Baggins	DCW Transactional- Center 1	AM, Before School Care	12/05/2017	8:00 AM EST	dcw_kgass	9:00 AM EST	dcw_kgass	1:00	1.00	NORM
323500	419208		Bilbo	Baggins	DCW Transactional- Center 1	AM, Before School Care	12/06/2017	8:00 AM EST	dcw_kgass	10:00 AM EST	dcw_kgass	2:00	2.00	NORM
323500	419208		Bilbo	Baggins	DCW Transactional- Center 1	AM, Before School Care	01/10/2018	2:08 PM EST	633758			0:00	0.00	NORM
323500	419208		Bilbo	Baggins	DCW Transactional- Center 1	AM, Before School Care	02/01/2018	7:00 AM EST	dcw_kgass			0:00	0.00	NORM
					Bilbo Baggins Total							**4:30**	**4.50**	
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	12/04/2017	7:00 AM EST	dcw_kgass	8:30 AM EST	dcw_kgass	1:30	1.50	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	12/05/2017	7:30 AM EST	dcw_kgass	8:30 AM EST	dcw_kgass	1:00	1.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	12/06/2017	8:00 AM EST	dcw_kgass	10:00 AM EST	dcw_kgass	2:00	2.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	01/10/2018	2:08 PM EST	633758	2:10 PM EST	633758	0:01	0.02	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	02/01/2018	7:00 AM EST	dcw_kgass			0:00	0.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	04/02/2018	8:00 AM EDT	BelleBeautyStaff	9:00 AM EDT	BelleBeautyStaff	1:00	1.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	04/10/2018	9:54 AM EDT	633758	9:55 AM EDT	633758	0:00	0.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	04/11/2018	3:47 PM EDT				0:00	0.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	04/16/2018	11:32 AM EDT	littlebopeep			0:00	0.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	04/22/2018	4:03 PM EDT	littlebopeep	4:20 PM EDT	littlebopeep	0:17	0.28	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	04/22/2018	4:41 PM EDT	littlebopeep			0:00	0.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	05/05/2018	2:14 PM EDT	633758	2:14 PM EDT	633758	0:00	0.00	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	05/10/2018	10:19 AM EDT	633758	10:20 AM EDT	633758	0:01	0.02	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	05/10/2018	10:47 AM EDT	littlebopeep	10:53 AM EDT	littlebopeep	0:06	0.10	NORM
323500	419209		Frodo	Baggins	DCW Transactional- Center 1	AM, Before School Care	05/15/2018	8:00 AM EDT	dcw_kgass	8:12 AM EDT	dcw_kgass	0:12	0.20	NORM
					Frodo Baggins Total							**6:07**	**6.12**	
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	12/04/2017	7:00 AM EST	dcw_kgass	8:30 AM EST	dcw_kgass	1:30	1.50	NORM
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	12/05/2017	7:30 AM EST	dcw_kgass	8:30 AM EST	dcw_kgass	1:00	1.00	NORM
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	12/22/2017	7:54 AM EST	dcw_kgass			0:00	0.00	NORM
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	04/02/2018	8:00 AM EDT	BelleBeautyStaff	9:00 AM EDT	BelleBeautyStaff	1:00	1.00	A
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	04/11/2018	3:47 PM EDT		3:49 PM EDT	littlebopeep	0:01	0.02	NORM
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	04/16/2018	11:31 AM EDT	littlebopeep			0:00	0.00	NORM
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	04/22/2018	4:07 PM EDT	littlebopeep	4:20 PM EDT	littlebopeep	0:13	0.22	NORM
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	05/10/2018	10:47 AM EDT	littlebopeep	10:53 AM EDT	littlebopeep	0:06	0.10	NORM
317254	411030		Merida	Brave	DCW Transactional- Center 1	AM, Before School Care	05/15/2018	8:00 AM EDT	dcw_kgass	8:15 AM EDT	dcw_kgass	0:15	0.25	NORM
					Merida Brave Total							**4:05**	**4.08**	
320241	415031		Eliza	Doolittle	DCW Transactional- Center 1	AM, Before School Care	12/04/2017	7:00 AM EST	dcw_kgass	8:30 AM EST	dcw_kgass	1:30	1.50	NORM
320241	415031		Eliza	Doolittle	DCW Transactional- Center 1	AM, Before School Care	12/22/2017	7:54 AM EST	dcw_kgass			0:00	0.00	NORM
320241	415031		Eliza	Doolittle	DCW Transactional- Center 1	AM, Before School Care	02/01/2018	7:00 AM EST	dcw_kgass			0:00	0.00	NORM
320241	415031		Eliza	Doolittle	DCW Transactional- Center 1	AM, Before School Care	04/10/2018	10:00 AM EDT	littlebopeep	10:10 AM EDT	littlebopeep	0:09	0.15	NORM

The attendance statistics summary is a nice report because it shows you expected vs actual. This is a four tab report that breaks attendance down by site, category, room and specific student! click here for an example of the report!📎

Note: If the child doesnt have hours in their schedule an expected number of hours will not populate.



Attendance Statistics Summary - Excel - Att

Report Category: Attendance

Report: Attendance Statistics Summary - Excel

Create a 4-sheet excel report that summarizes attendance for a week. The sheets include the number of children who attended, the number of scheduled hours, scheduled FTEs, attended number of hours, attended FTE, and the variance between scheduled and attended. This information is visible by center, category, classroom, and student.

Search Criteria

Center: --

Semester: --

Category: --

Room: --

From Date: 05/14/2018

To Date: 05/18/2018

Period Number:

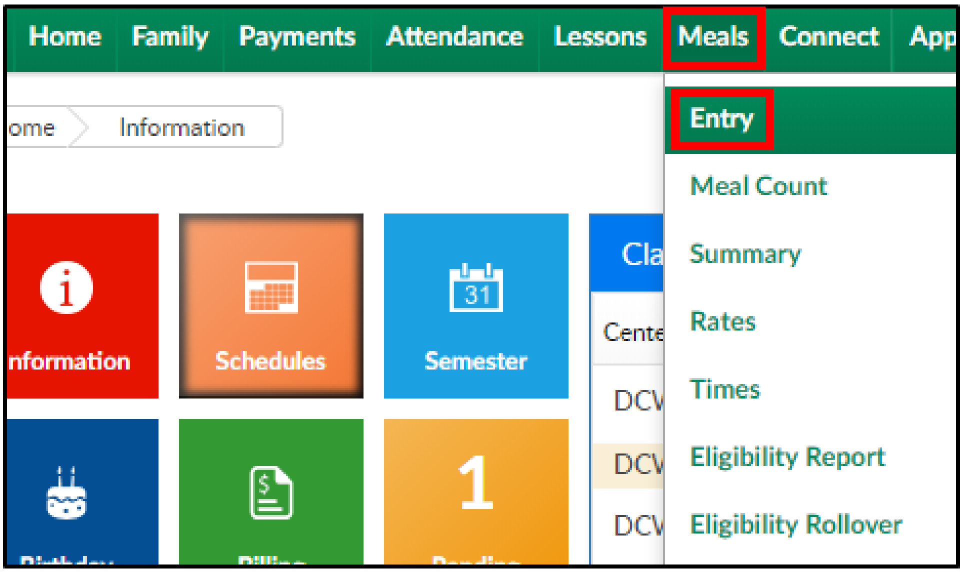
Period Year:

Meals > Entry

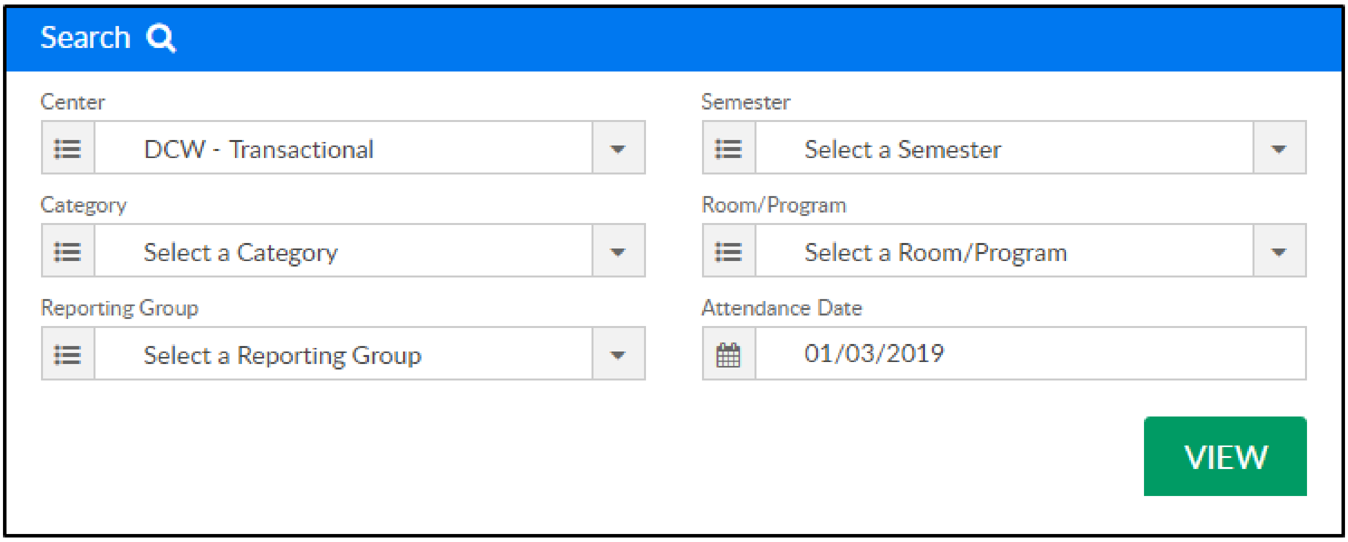
Last Modified on 01/03/2019 9:53 am EST

The Meals > Entry page allows users to record meals served from the admin side. If using CACFP, the system will automatically report the number of Free, Reduced, or Paid students that were marked as served and display the information on the Meals > Summary page.

1. From the Meals menu, click Entry



2. Use the Search area to find the program being served meals. **Please Note**: a room/program must be selected



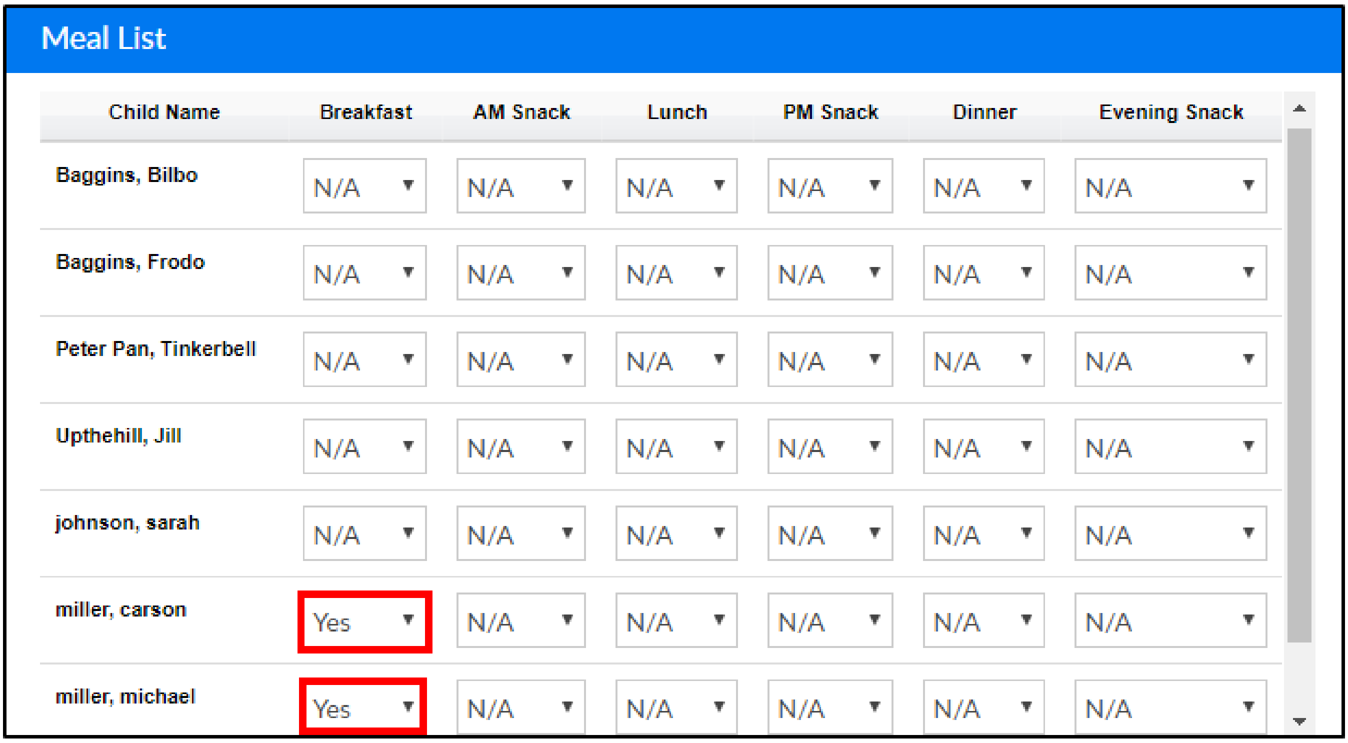
Center: DCW - Transactional
Semester: Select a Semester
Category: Select a Category
Room/Program: Select a Room/Program
Reporting Group: Select a Reporting Group
Attendance Date: 01/03/2019

3. Click View to view the list of students in the selected room/program

Meal List

Child Name	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening Snack
Baggins, Bilbo	N/A	N/A	N/A	N/A	N/A	N/A
Baggins, Frodo	N/A	N/A	N/A	N/A	N/A	N/A
Peter Pan, Tinkerbell	N/A	N/A	N/A	N/A	N/A	N/A
Upthehill, Jill	N/A	N/A	N/A	N/A	N/A	N/A
johnson, sarah	N/A	N/A	N/A	N/A	N/A	N/A
miller, carson	N/A	N/A	N/A	N/A	N/A	N/A
miller, michael	N/A	N/A	N/A	N/A	N/A	N/A

4. To record a meal, locate the student and the meal to be served



Meal List

Child Name	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening Snack
Baggins, Bilbo	N/A	N/A	N/A	N/A	N/A	N/A
Baggins, Frodo	N/A	N/A	N/A	N/A	N/A	N/A
Peter Pan, Tinkerbell	N/A	N/A	N/A	N/A	N/A	N/A
Upthehill, Jill	N/A	N/A	N/A	N/A	N/A	N/A
johnson, sarah	N/A	N/A	N/A	N/A	N/A	N/A
miller, carson	Yes	N/A	N/A	N/A	N/A	N/A
miller, michael	Yes	N/A	N/A	N/A	N/A	N/A

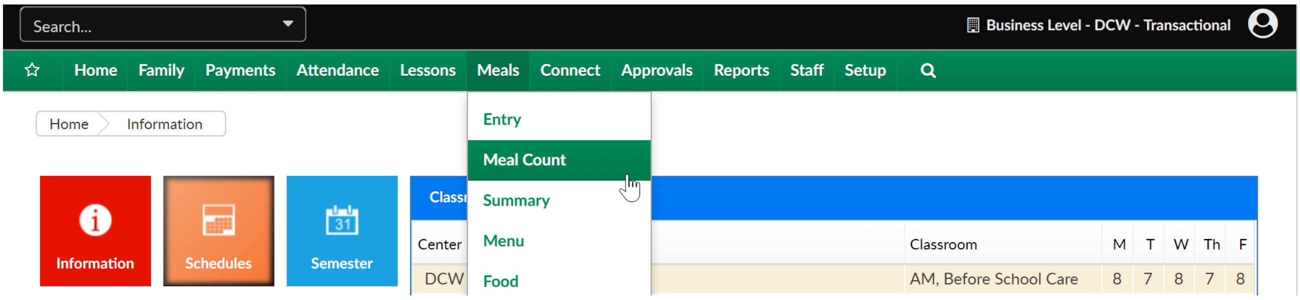
- Yes - the meal was served
- No - the meal was not served

5. Once Yes/No is selected, the page automatically saves the data. There is no save button

Meals > Meal Count

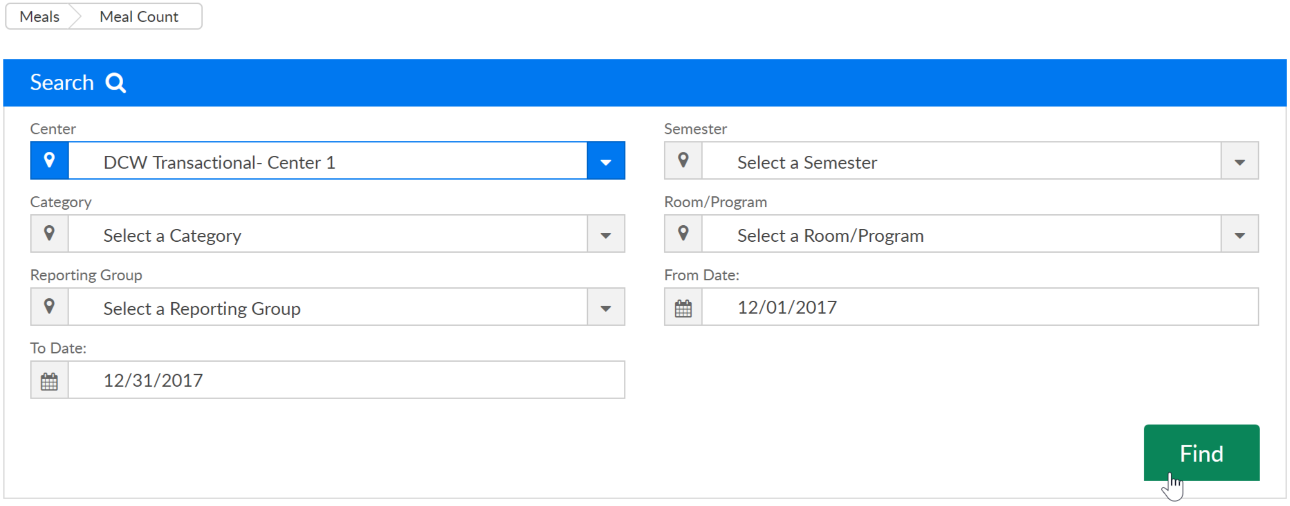
Last Modified on 03/30/2018 8:46 am EDT

The Meal Count screen will display the number of meals served in a particular period for a particular site. From the Meals menu, select the Meal Count option.



On the meal count screen, select search criteria- then press Find.

- Center
- Semester
- Category
- Room/Program
- Reporting Group
- From Date
- To Date



Center: DCW Transactional- Center 1

Semester: Select a Semester

Category: Select a Category

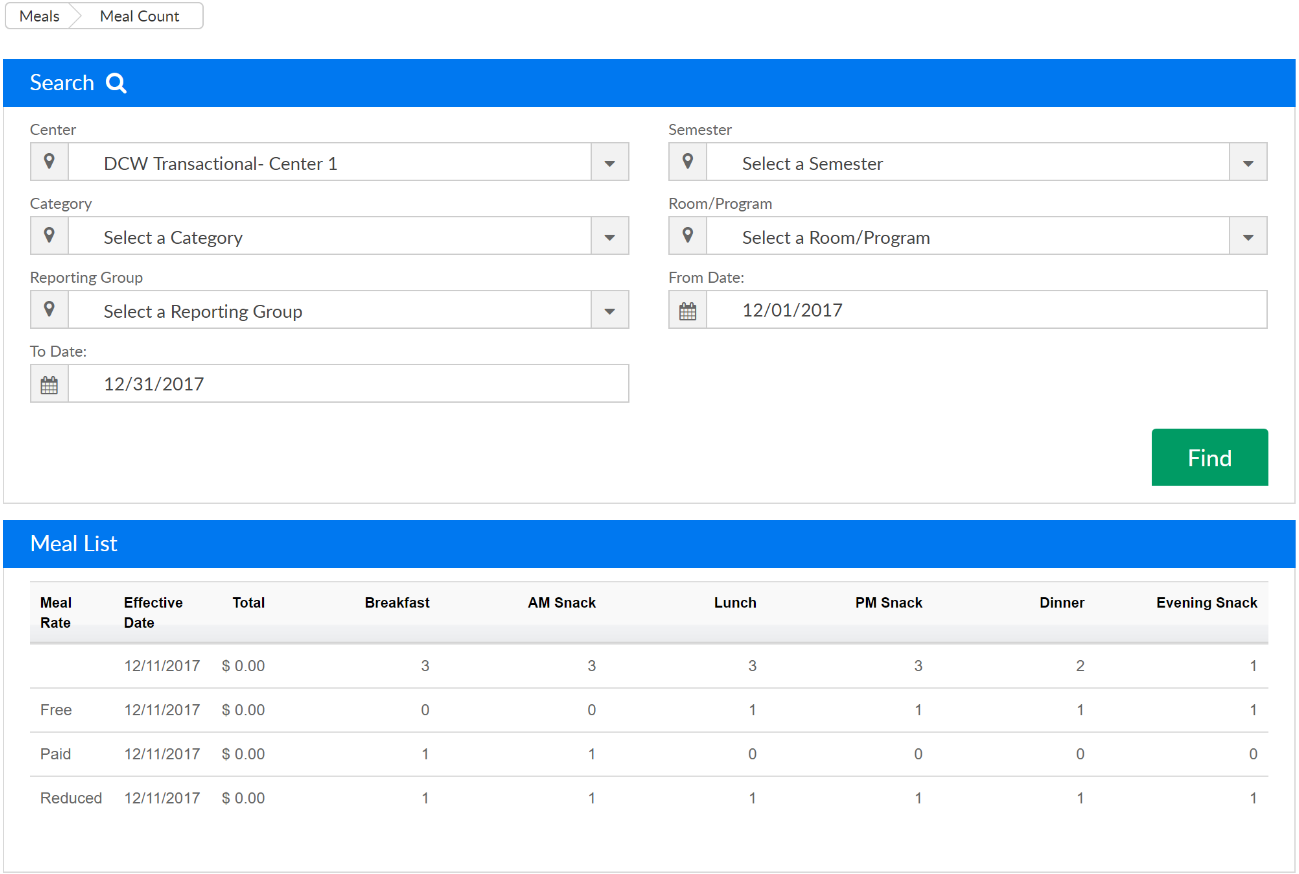
Room/Program: Select a Room/Program

Reporting Group: Select a Reporting Group

From Date: 12/01/2017

To Date: 12/31/2017

Results will display based on the rate that has been setup and linked to the child's CACFP status . This is for view only purposes if a report is required, go to Meals > Summary or Reports > Room/Program .



Search

Center: DCW Transactional- Center 1

Semester: Select a Semester

Category: Select a Category

Room/Program: Select a Room/Program

Reporting Group: Select a Reporting Group

From Date: 12/01/2017

To Date: 12/31/2017

Meal List

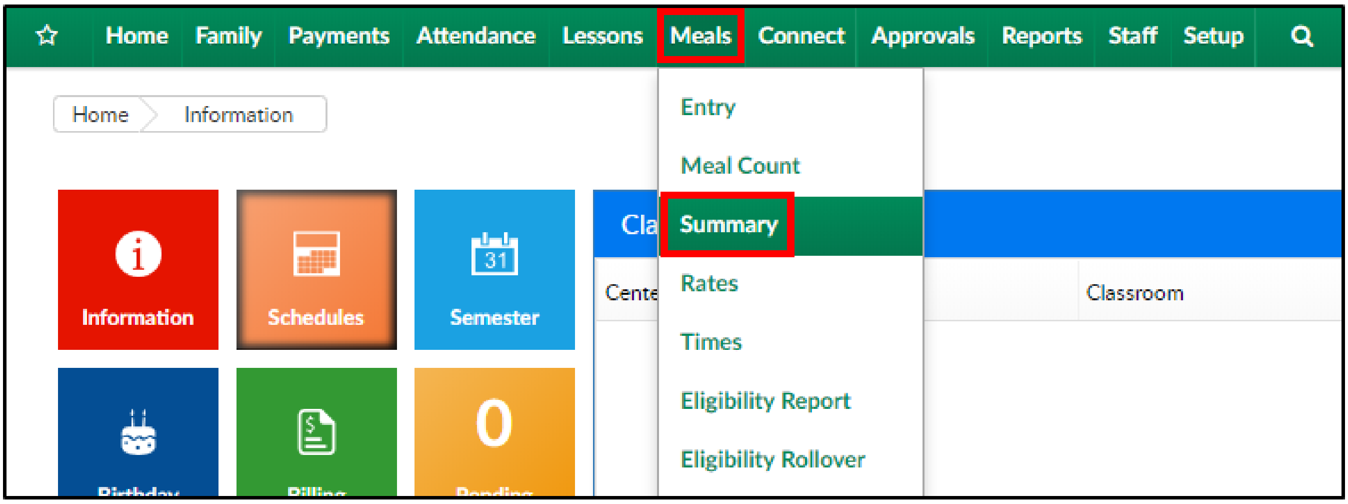
Meal Rate	Effective Date	Total	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening Snack
	12/11/2017	$ 0.00	3	3	3	3	2	1
Free	12/11/2017	$ 0.00	0	0	1	1	1	1
Paid	12/11/2017	$ 0.00	1	1	0	0	0	0
Reduced	12/11/2017	$ 0.00	1	1	1	1	1	1

Meals > Summary

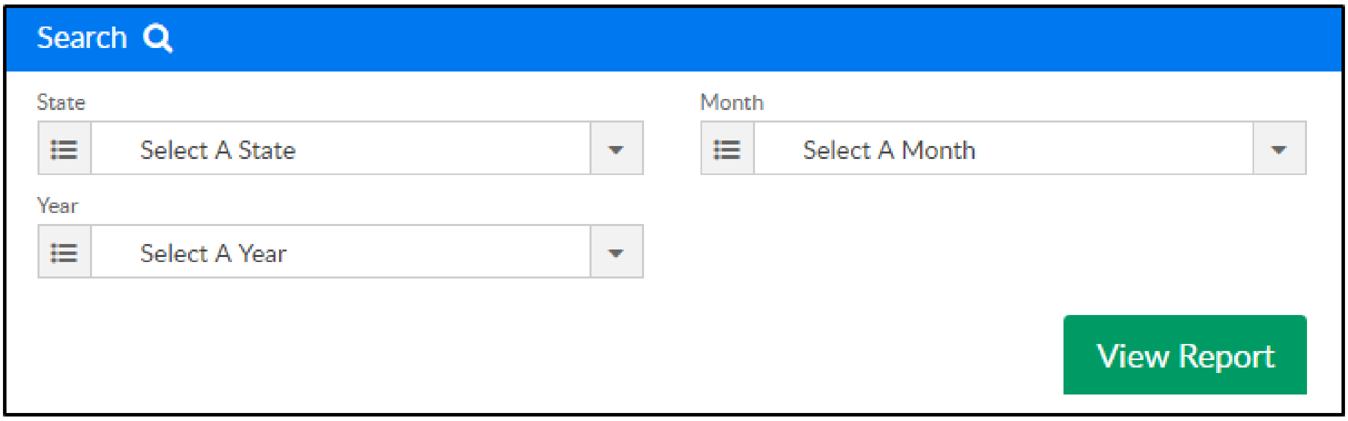
Last Modified on 01/04/2019 10:12 am EST

The Meals > Summary screen will display a CACFP Report Summary for a selected State, Month, and Year.

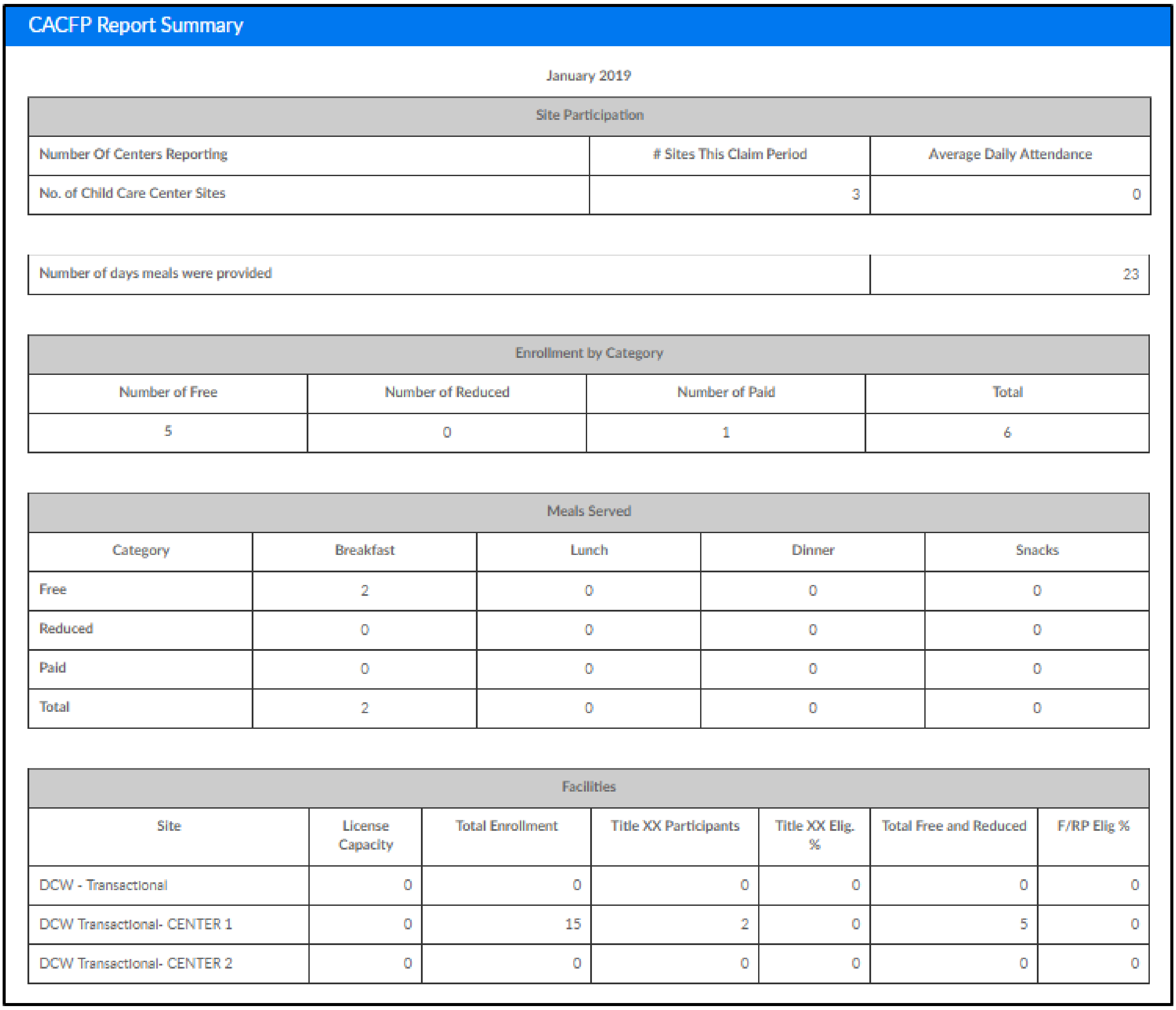
1. From the Meals menu, select Summary



2. In the Search section, select the State, Month, and Year



3. Click View Report
4. Results will display in the CACFP Report Summary section. **Please Note**: if the site has a business level, it will be included in the number of centers reporting figure



CACFP Report Summary

January 2019

Site Participation		
Number Of Centers Reporting	# Sites This Claim Period	Average Daily Attendance
No. of Child Care Center Sites	3	0

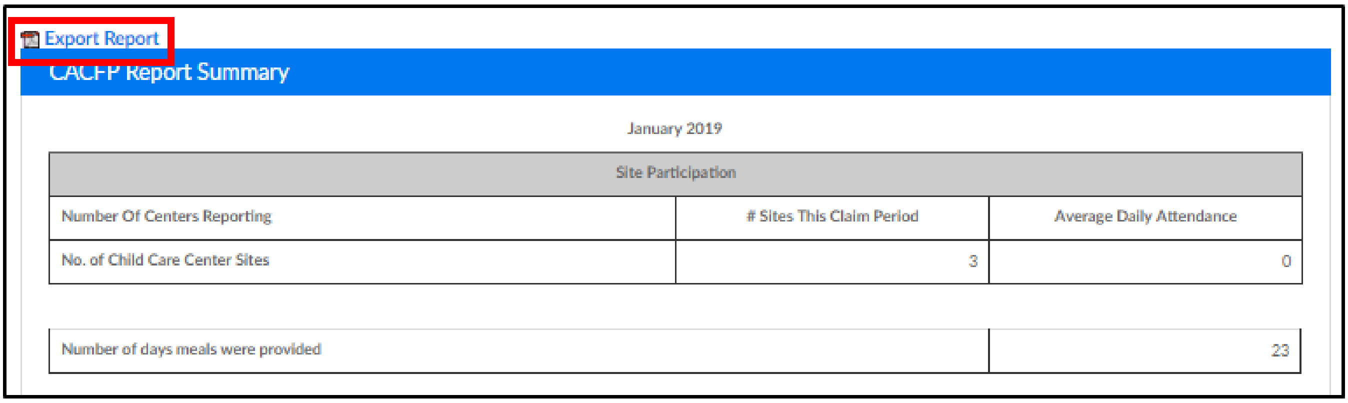
Number of days meals were provided	23

Enrollment by Category			
Number of Free	Number of Reduced	Number of Paid	Total
5	0	1	6

Meals Served				
Category	Breakfast	Lunch	Dinner	Snacks
Free	2	0	0	0
Reduced	0	0	0	0
Paid	0	0	0	0
Total	2	0	0	0

Facilities						
Site	License Capacity	Total Enrollment	Title XX Participants	Title XX Elig. %	Total Free and Reduced	F/RP Elig %
DCW - Transactional	0	0	0	0	0	0
DCW Transactional- CENTER 1	0	15	2	0	5	0
DCW Transactional- CENTER 2	0	0	0	0	0	0

5. Select the Export Report option to open a PDF version of this screen, click here to see an example of the report



CACFP Report Summary

January 2019

Site Participation		
Number Of Centers Reporting	# Sites This Claim Period	Average Daily Attendance
No. of Child Care Center Sites	3	0

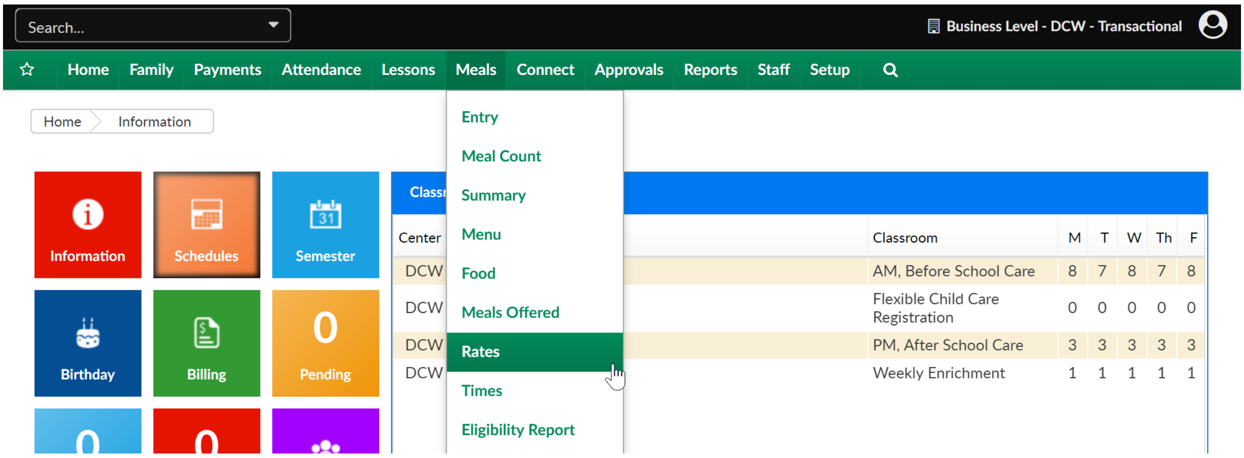
Number of days meals were provided	23

Meals > Rates

Last Modified on 12/11/2017 9:11 am EST

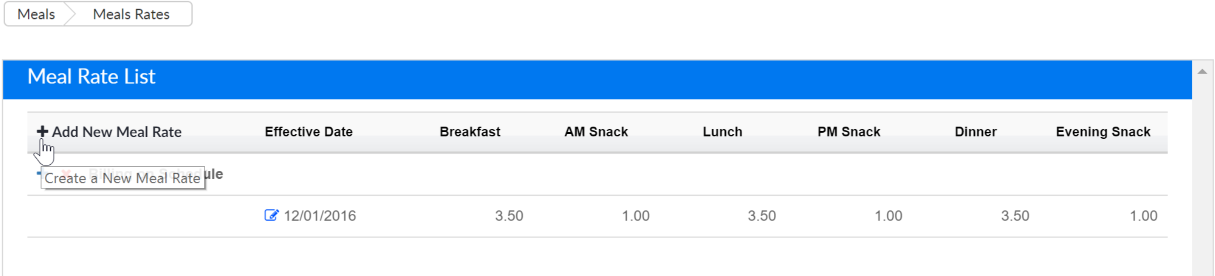
The Meals > Rates screen allows users to add the rate for meals for both CACFP and Non-CACFP sites.

From the Meals menu, select the Rates option.



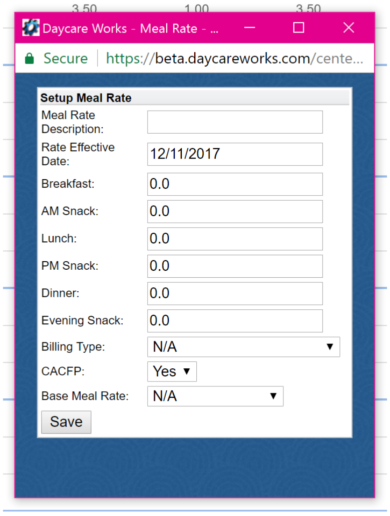
Center	Classroom	M	T	W	Th	F
DCW	AM, Before School Care	8	7	8	7	8
DCW	Flexible Child Care Registration	0	0	0	0	0
DCW	PM, After School Care	3	3	3	3	3
DCW	Weekly Enrichment	1	1	1	1	1

On the Rates screen, existing meal rates will display. To add a new rate, select the +Add New Meal Rate button



+ Add New Meal Rate	Effective Date	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening Snack
	12/01/2016	3.50	1.00	3.50	1.00	3.50	1.00

Add a name for the rate, the effective date, the rate for each meal type, the billing type, if this is a CACFP rate or not, if it is a CACFP rate which category the rate should apply to (free, reduced or paid). Press Save to commit rate to the system.



Setup Meal Rate

Meal Rate Description:

Rate Effective Date: 12/11/2017

Breakfast: 0.0

AM Snack: 0.0

Lunch: 0.0

PM Snack: 0.0

Dinner: 0.0

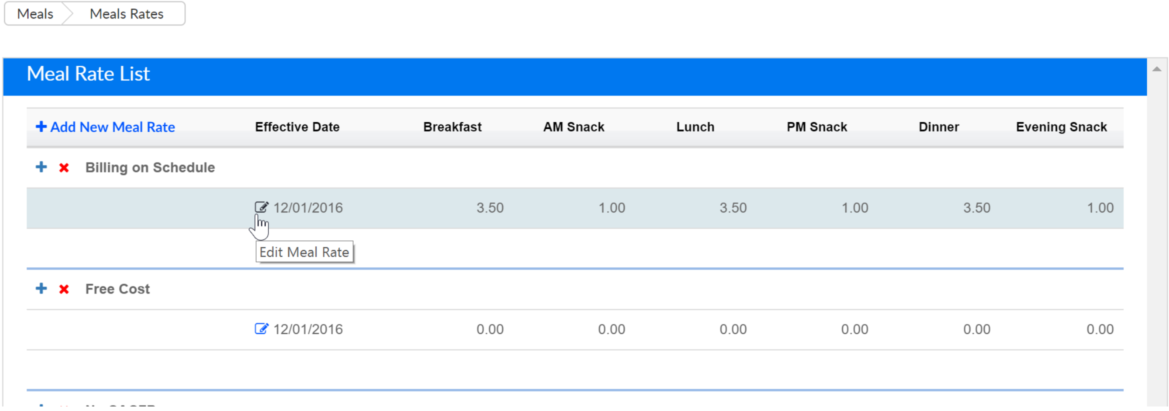
Evening Snack: 0.0

Billing Type: N/A

CACFP: Yes

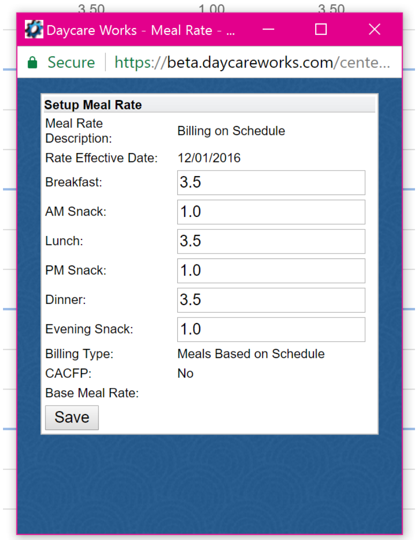
Base Meal Rate: N/A

If a rate needs to be edited, select the edit icon next to the date field.



+ Add New Meal Rate	Effective Date	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening Snack
+ ✖ **Billing on Schedule**							
	12/01/2016	3.50	1.00	3.50	1.00	3.50	1.00
+ ✖ **Free Cost**							
	12/01/2016	0.00	0.00	0.00	0.00	0.00	0.00

Add the updated rates then press Save.



Setup Meal Rate

Meal Rate Description: Billing on Schedule

Rate Effective Date: 12/01/2016

Breakfast: 3.5

AM Snack: 1.0

Lunch: 3.5

PM Snack: 1.0

Dinner: 3.5

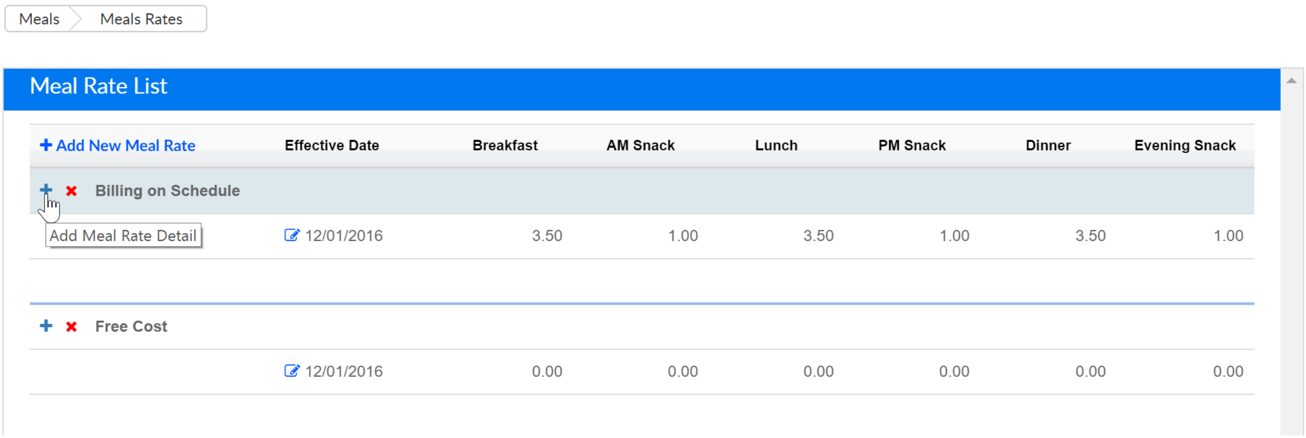
Evening Snack: 1.0

Billing Type: Meals Based on Schedule

CACFP: No

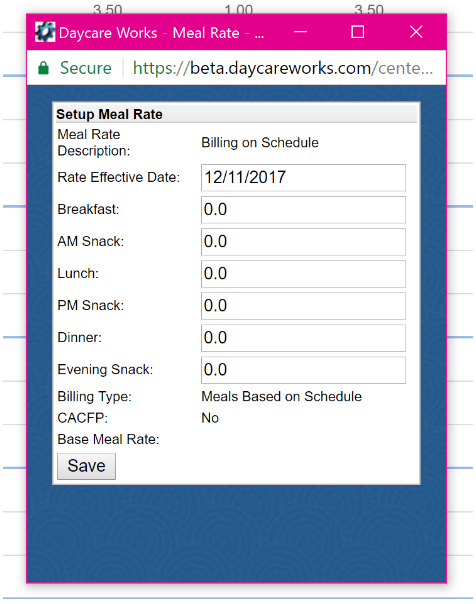
Base Meal Rate:

To add a new effective date, press the plus button next to the rate name-



+ Add New Meal Rate	Effective Date	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening Snack
+ ✖ **Billing on Schedule**							
	12/01/2016	3.50	1.00	3.50	1.00	3.50	1.00
+ ✖ **Free Cost**							
	12/01/2016	0.00	0.00	0.00	0.00	0.00	0.00

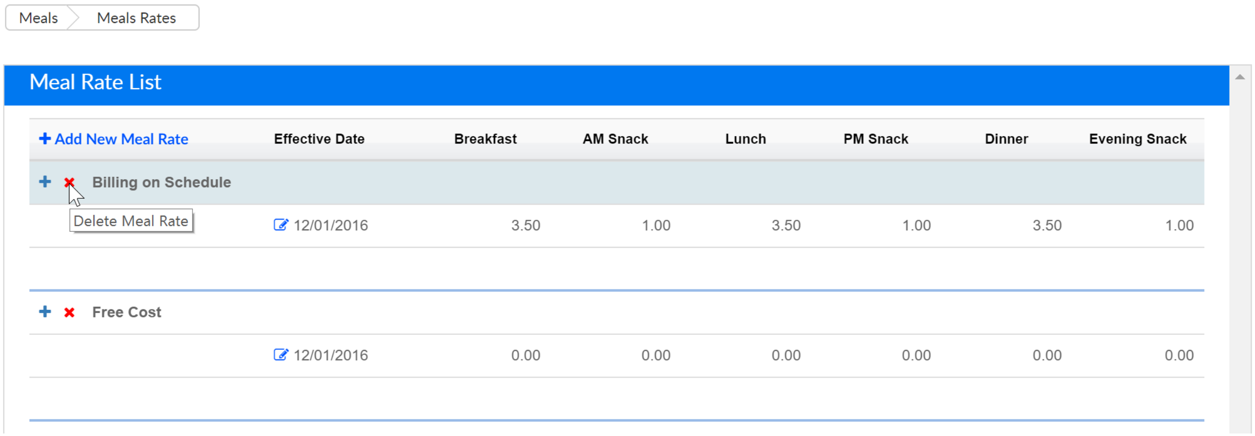
Add the new effective date and rates for each meal, then press save.



Setup Meal Rate

Meal Rate Description:	Billing on Schedule
Rate Effective Date:	12/11/2017
Breakfast:	0.0
AM Snack:	0.0
Lunch:	0.0
PM Snack:	0.0
Dinner:	0.0
Evening Snack:	0.0
Billing Type:	Meals Based on Schedule
CACFP:	No
Base Meal Rate:	

If a rate needs to be deleted, press the red X button. When you select the red X button, this will remove the rate from the system entirely.



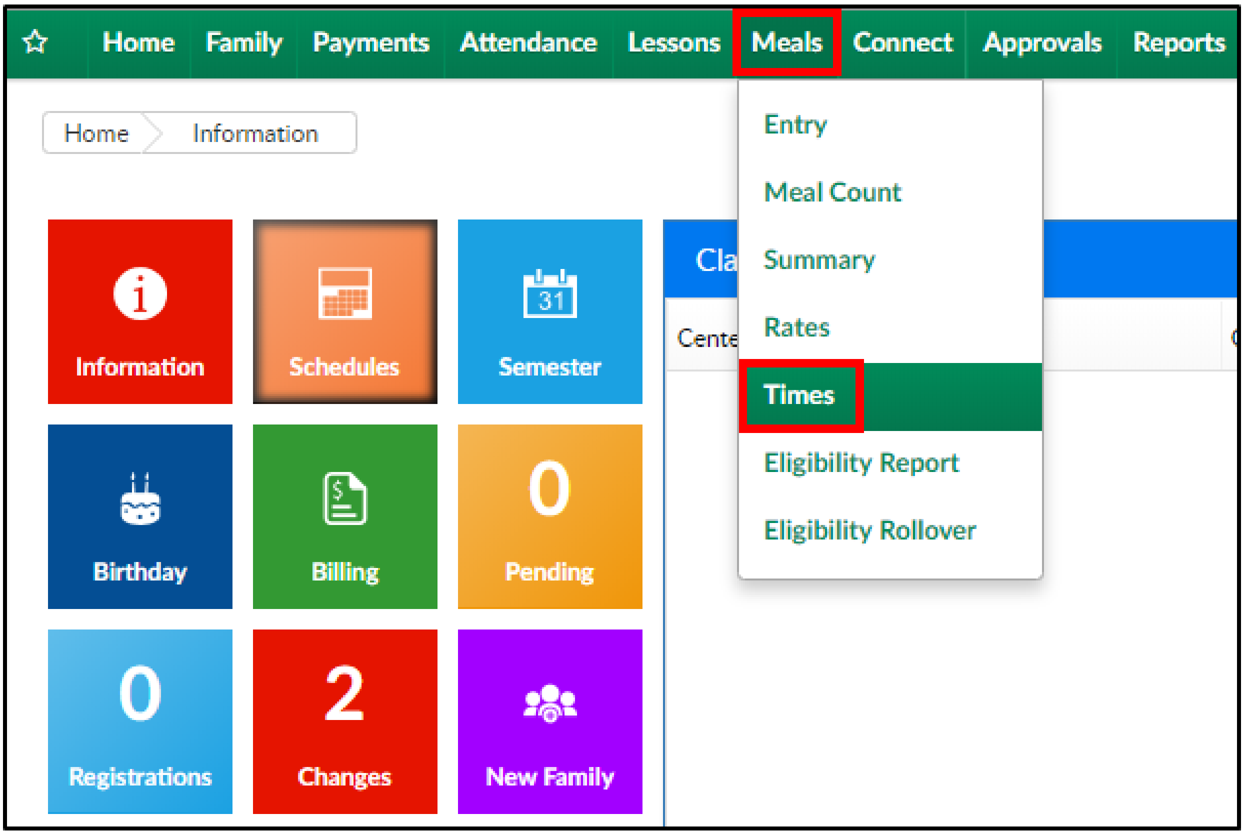
+ Add New Meal Rate	Effective Date	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening Snack
+ ✖ **Billing on Schedule**							
	12/01/2016	3.50	1.00	3.50	1.00	3.50	1.00
+ ✖ **Free Cost**							
	12/01/2016	0.00	0.00	0.00	0.00	0.00	0.00

Meals > Times

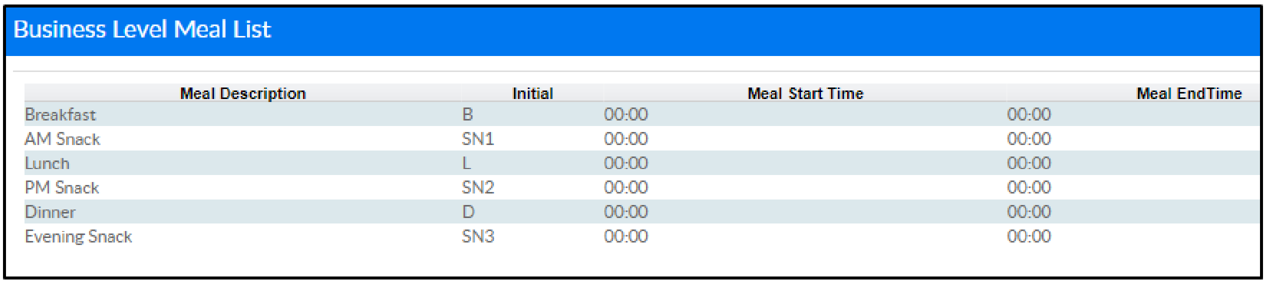
Last Modified on 01/02/2019 12:30 pm EST

The system allows centers to add times meals will be served for each type of meal. To setup times, follow the steps below:

1. From the Meal drop-down menu, select Times



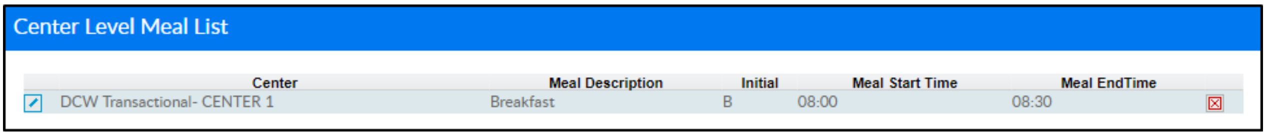
2. On the Times screen, there are 3 separate sections:
    - Business Level Meal List - times for each meal setup at the business level



Business Level Meal List

Meal Description	Initial	Meal Start Time	Meal EndTime
Breakfast	B	00:00	00:00
AM Snack	SN1	00:00	00:00
Lunch	L	00:00	00:00
PM Snack	SN2	00:00	00:00
Dinner	D	00:00	00:00
Evening Snack	SN3	00:00	00:00

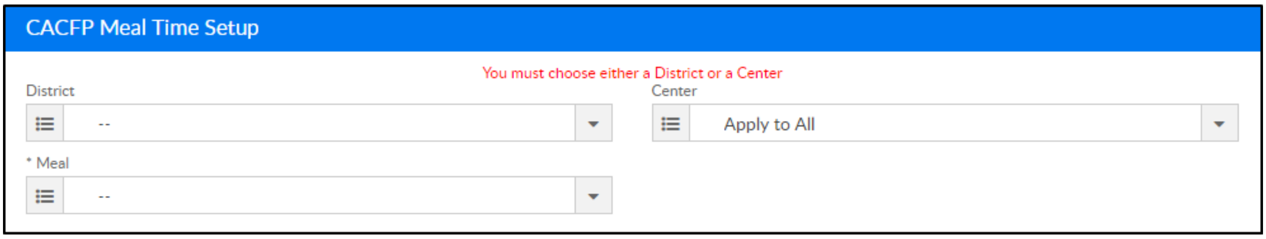
    - Center Level Meal List - times for each meal setup at the center level



Center Level Meal List

	Center	Meal Description	Initial	Meal Start Time	Meal EndTime	
✎	DCW Transactional- CENTER 1	Breakfast	B	08:00	08:30	☒

    - CACFP Meal Time Setup - this section is used to add meal times



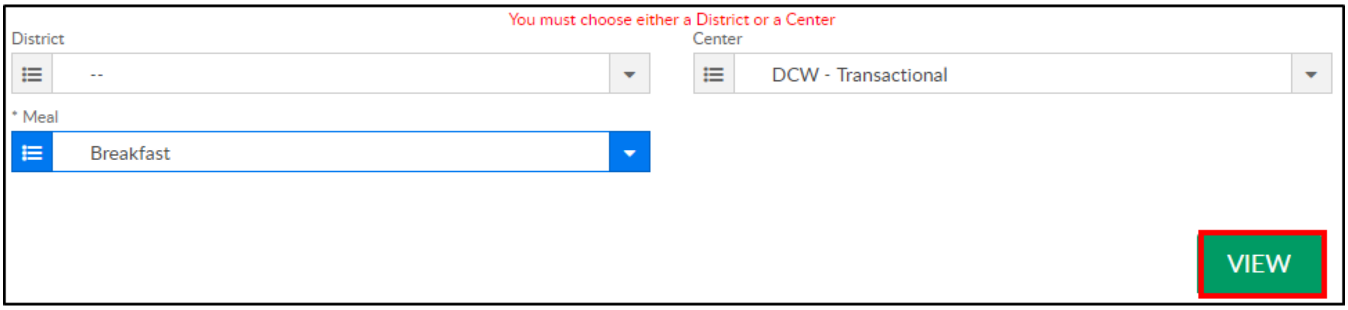
You must choose either a District or a Center

District: --

Center: Apply to All

* Meal: --

3. In the CACFP Meal Time Setup section, choose from the District drop-down, if applicable
4. Select the center or business level from the Center drop-down
5. Choose the Meal from the drop-down menu
6. Click View



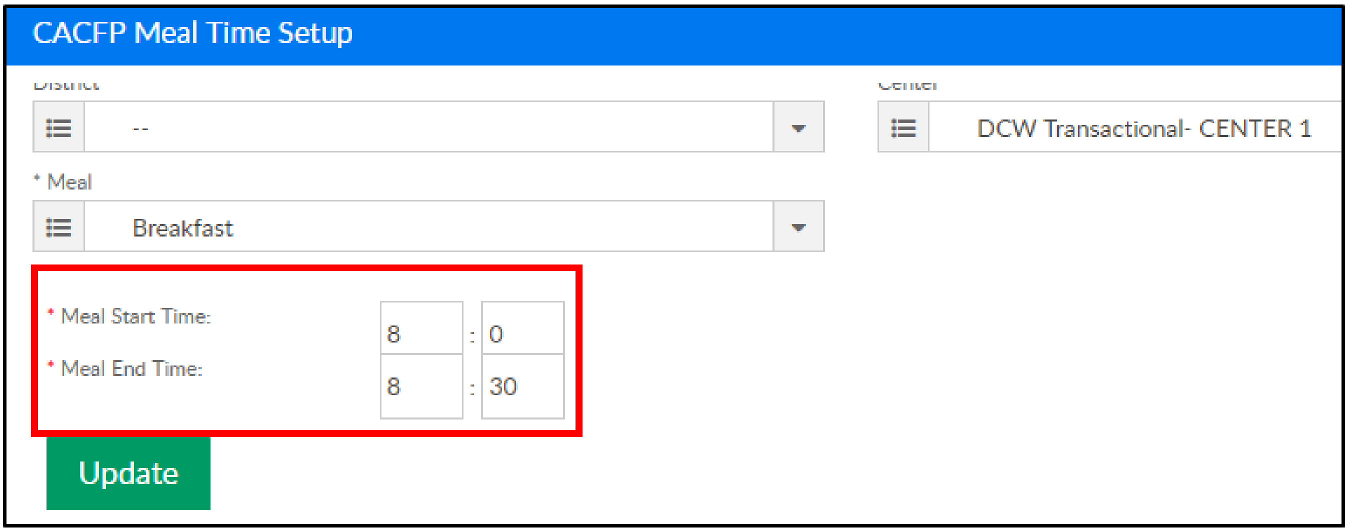
You must choose either a District or a Center

District: --

Center: DCW - Transactional

* Meal: Breakfast

7. If meal times were previously added, view the times and update as needed. If no meal times have been added, enter the meal times in the necessary fields. **Please Note:** meal times must be entered in military time



District: --

Center: DCW Transactional- CENTER 1

* Meal: Breakfast

* Meal Start Time: 8 : 0

* Meal End Time: 8 : 30

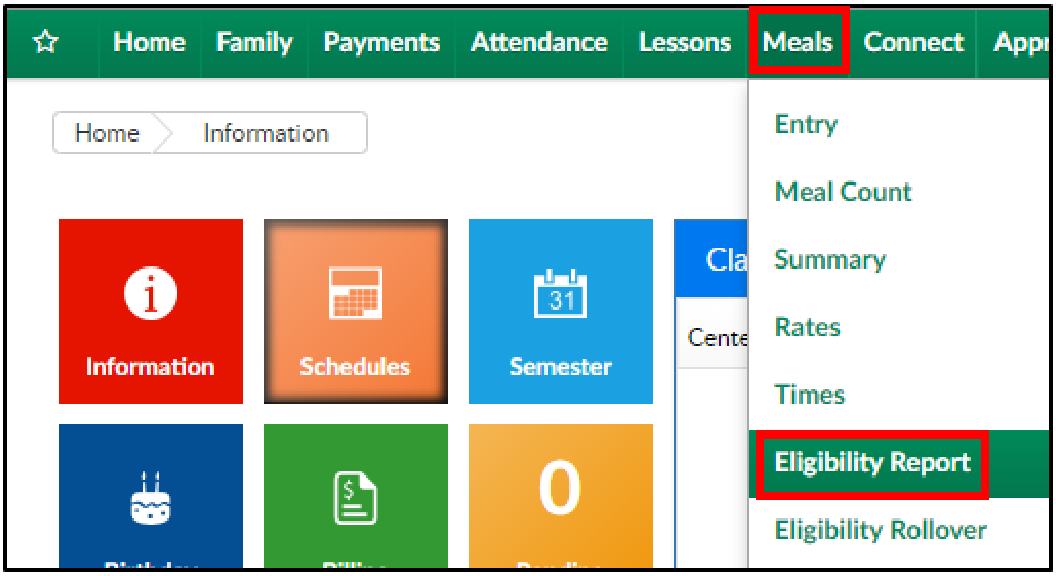
8. Click Update to save any changes
9. Continue this process until all times have been added

Meals > Eligibility Report

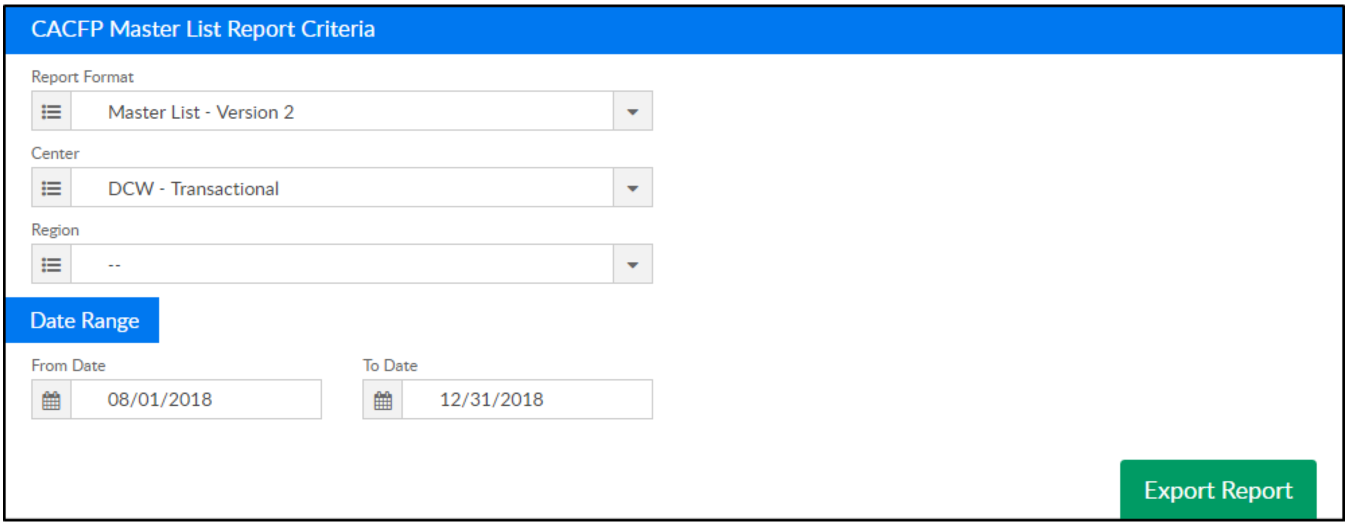
Last Modified on 01/03/2019 1:03 pm EST

The Eligibility Report displays all students within a center and their eligibility for receiving CACFP benefits with their status (Free, Reduced, or Paid). There is also a Master List Import link on this screen to import the data into the system.

1. Click Meals, then select Eligibility Report



2. In the CACFP Master List Report Criteria section, select search criteria for the report



Report Format: Master List - Version 2

Center: DCW - Transactional

Region: --

From Date: 08/01/2018

To Date: 12/31/2018

   - Report Format
      - Master List - Click here for example report 📎
      - Master List - Version 2 - Click here for example report 📎
      - Master List - Version 3 - Click here for example report 📎
   - Center - select the center or business level

    - Region - choose a region, if applicable
    - Date Range
        - From - select a start date from the calendar
        - To - choose an end date from the calendar
3. Period (if the user selects Master List - Version 2) - this option is only applicable for Defined billing sites, it does not apply to Transactional billing
    - Number - enter the billing period the data relates to
    - Year - enter the year
4. Click Export Report to open the report

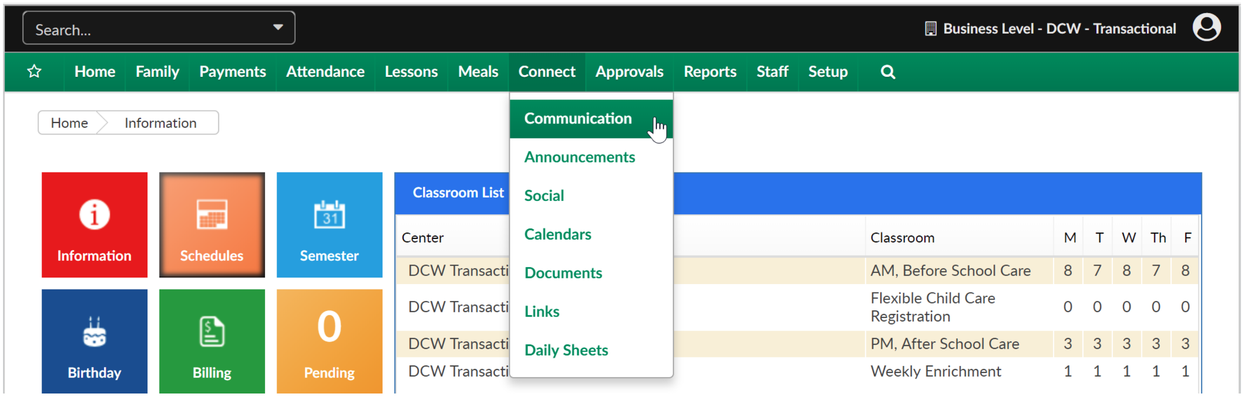
Connect > Communication

Last Modified on 03/30/2018 8:48 am EDT

The Communications screen acts as the hub for sending notifications to parents from the admin side. On this screen, users can send emails, text messages* and phone calls*.

*Additional fees apply

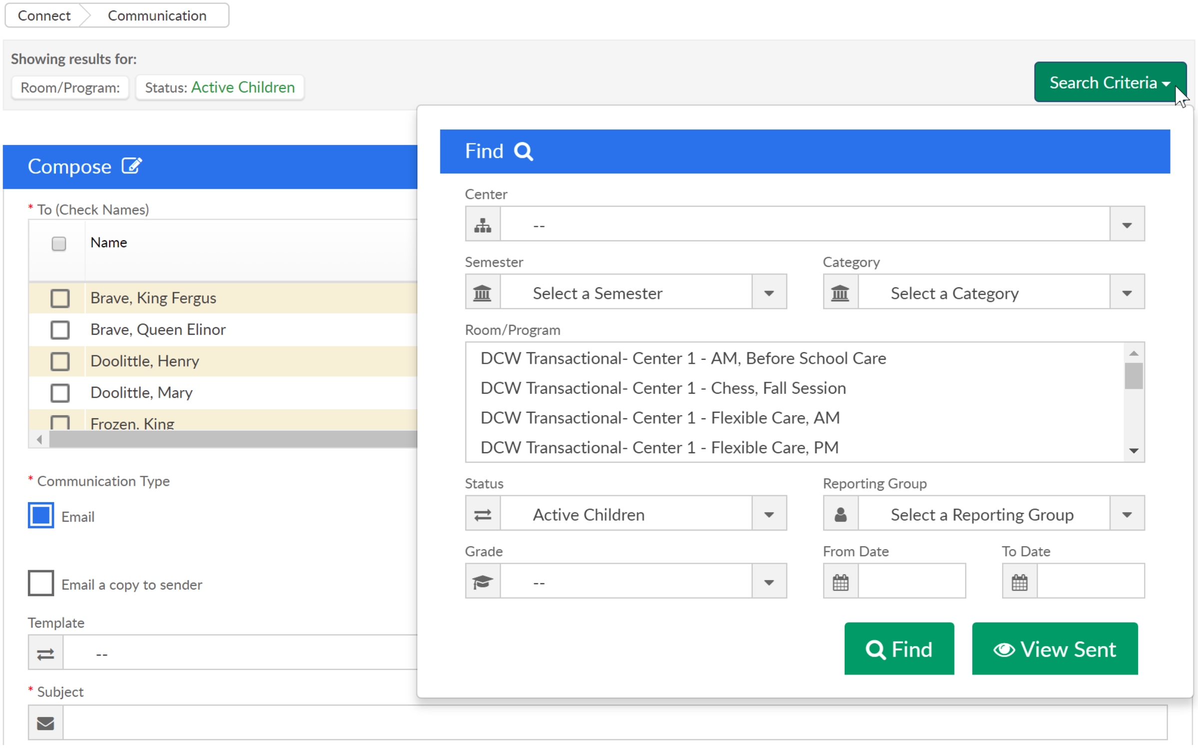
From the Connect/Portal menu select the Communication tab.



Center	Classroom	M	T	W	Th	F
DCW Transacti	AM, Before School Care	8	7	8	7	8
DCW Transacti	Flexible Child Care Registration	0	0	0	0	0
DCW Transacti	PM, After School Care	3	3	3	3	3
DCW Transacti	Weekly Enrichment	1	1	1	1	1

Press the Search Criteria to select which filters to use. The filters will allow the user to limit their parent selections. Once criteria has been selected press the Find button.

- Center
- Semester
- Category
- Room/Program
- Status
- Reporting Group
- Grade
- From Date
- To Date



Connect > Communication

Showing results for:

Room/Program: | Status: Active Children

Compose

* To (Check Names)

☐	Name
☐	Brave, King Fergus
☐	Brave, Queen Elinor
☐	Doolittle, Henry
☐	Doolittle, Mary
☐	Frozen, King

* Communication Type

☑ Email

☐ Email a copy to sender

Template: --

* Subject

Find

Center: --

Semester: Select a Semester

Category: Select a Category

Room/Program:
- DCW Transactional- Center 1 - AM, Before School Care
- DCW Transactional- Center 1 - Chess, Fall Session
- DCW Transactional- Center 1 - Flexible Care, AM
- DCW Transactional- Center 1 - Flexible Care, PM

Status: Active Children

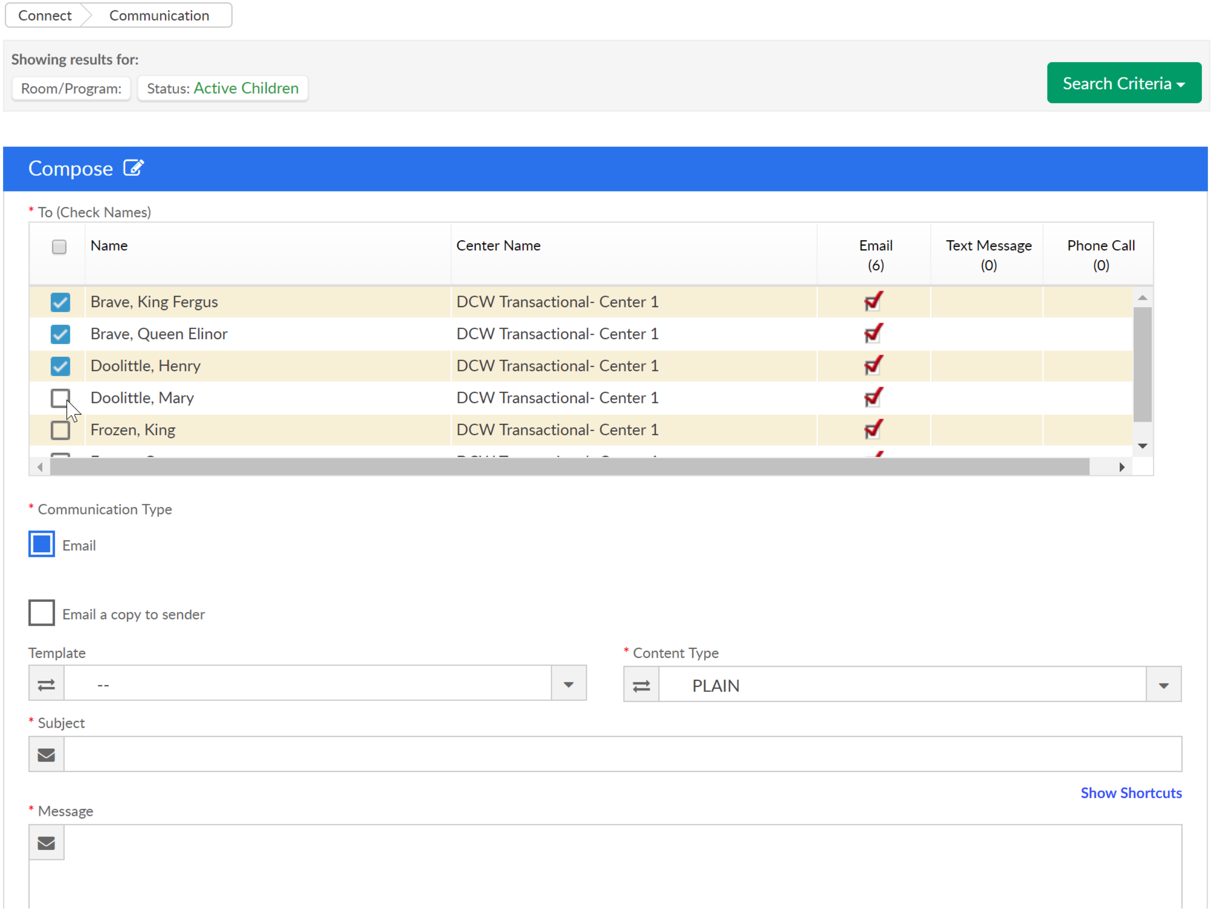
Reporting Group: Select a Reporting Group

Grade: --

From Date:

To Date:

Select the parents that should receive the communication by selecting the boxes next to each parent's name (if you have phone or text messaging parents with applicable details will display with checkboxes in the phone or text column).



Connect > Communication

Showing results for:

Room/Program: | Status: Active Children

Compose

* To (Check Names)

☐	Name	Center Name	Email (6)	Text Message (0)	Phone Call (0)
☑	Brave, King Fergus	DCW Transactional- Center 1	✓		
☑	Brave, Queen Elinor	DCW Transactional- Center 1	✓		
☑	Doolittle, Henry	DCW Transactional- Center 1	✓		
☐	Doolittle, Mary	DCW Transactional- Center 1	✓		
☐	Frozen, King	DCW Transactional- Center 1	✓		

* Communication Type

☑ Email

☐ Email a copy to sender

Template: --

* Content Type: PLAIN

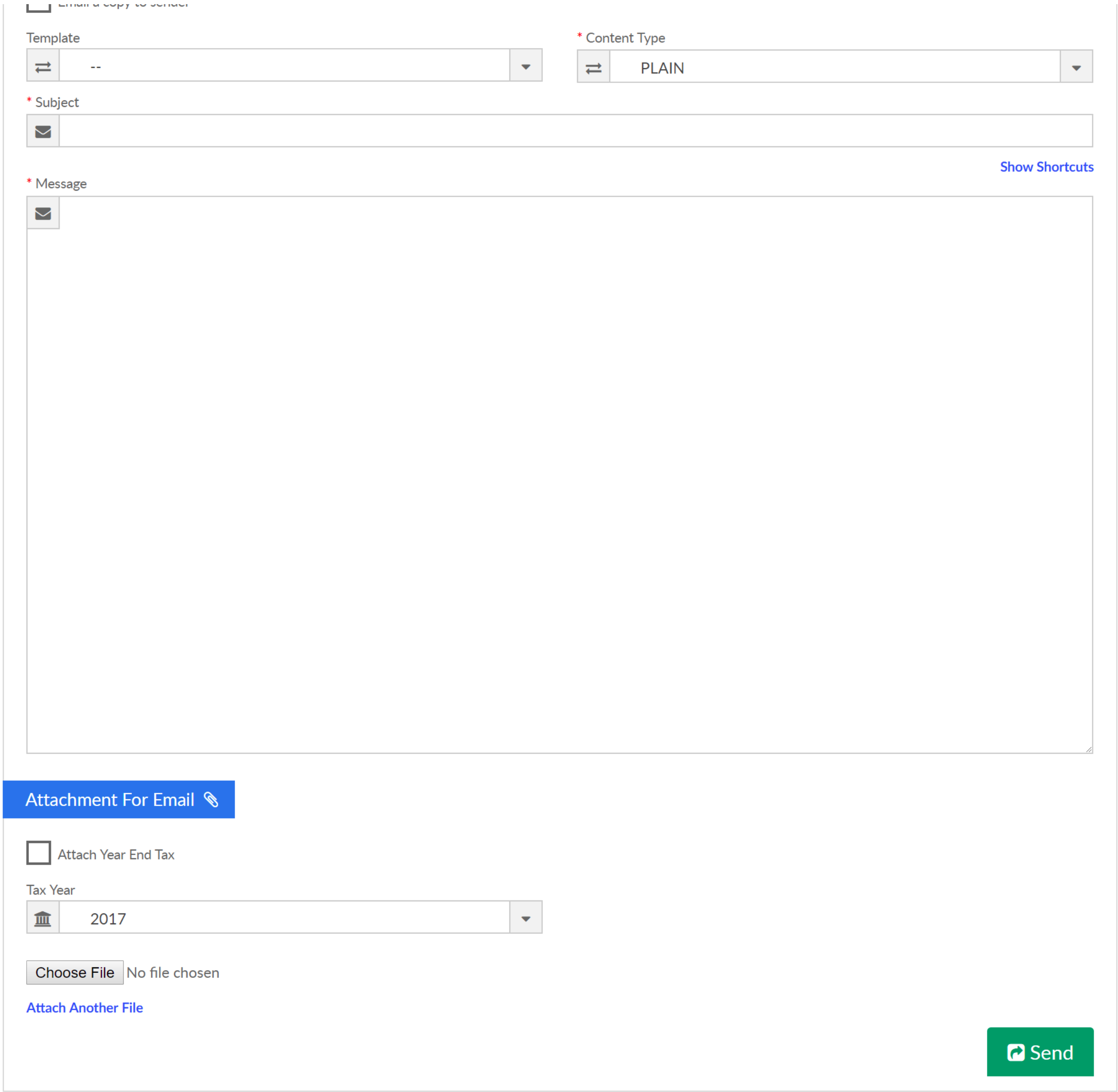
* Subject

* Message

Select if a copy of the email should be sent to the sender.

Select or enter the following detail, once complete press Send to send communication to selected parents.

- Template- this is where the system default and custom templates will display (this is optional and should be used if you have set templates from the setup > system config, email area).
- Content Type
    - Plain- text only
    - HTML- formatting and images
- Subject- enter text here to update the subject of a template or if the message is a one-time communication
- Message- enter text in the body of the communication
- Attach Year End Tax- this will send the users selected a copy of their year-end tax statement
- Tax Year- will allow the admin to select which year to send the tax statements for
- Choose File (Attach Another File)- allows users to send generic attachments to one or multiple families



Template
--

* Content Type
PLAIN

* Subject

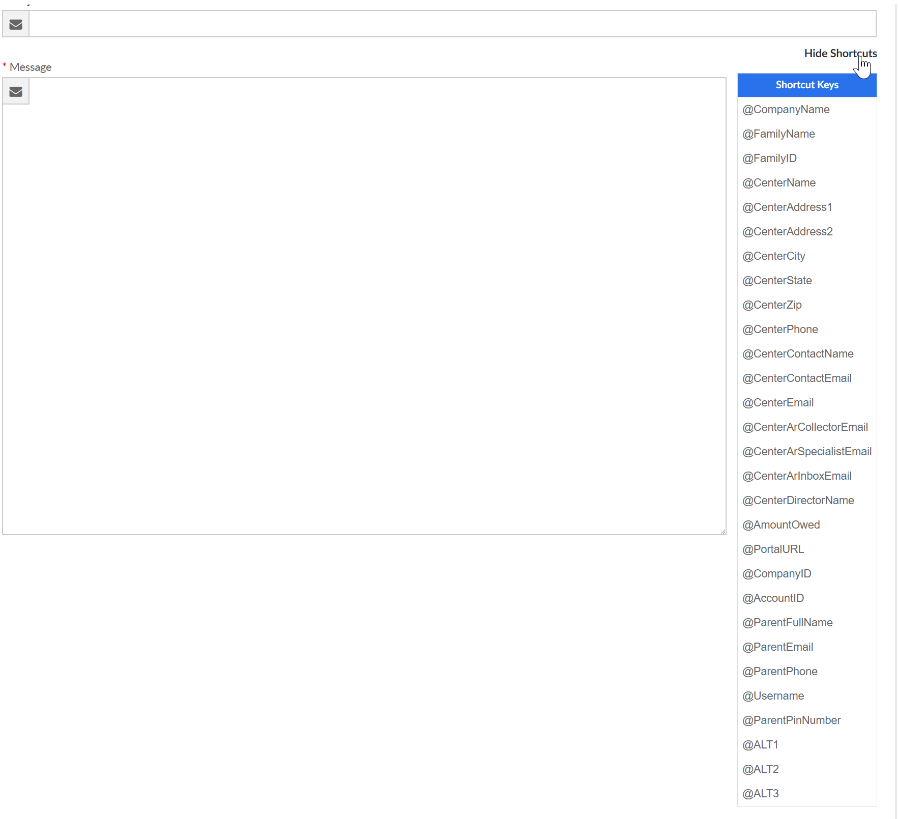
* Message

☐ Attach Year End Tax

Tax Year
2017

No file chosen

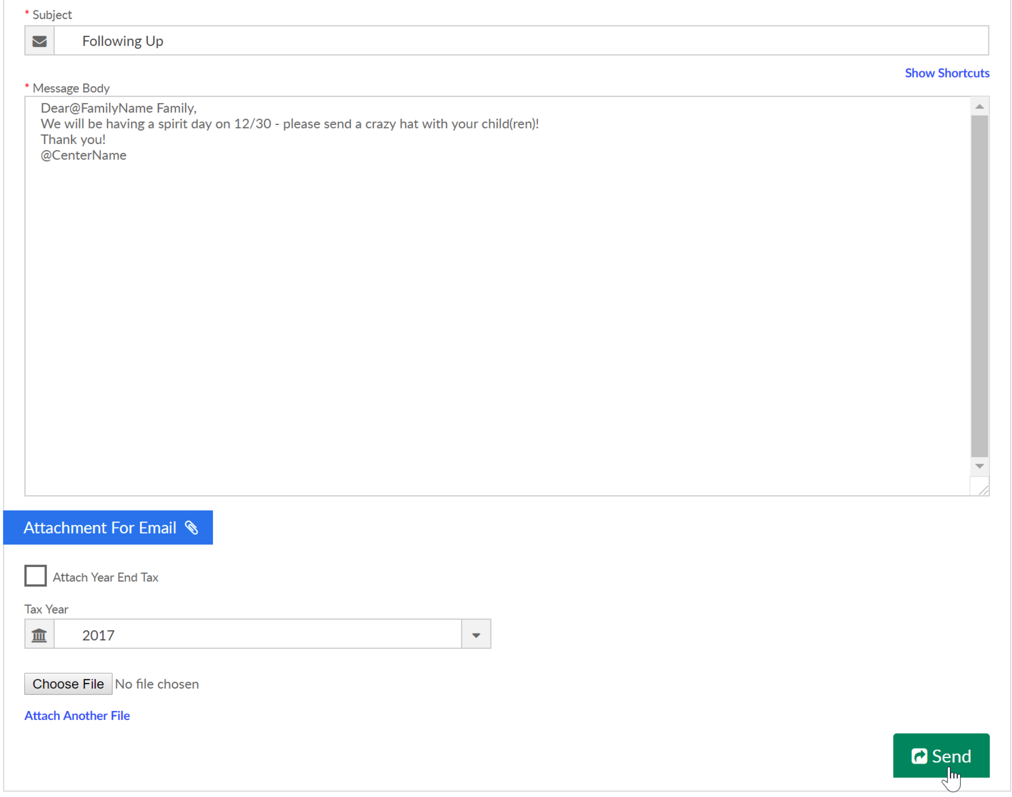
- Show Shortcuts- this will display shortcut codes that can be used to personalize messages



- @CompanyName
- @FamilyName
- @FamilyID
- @CenterName
- @CenterAddress1
- @CenterAddress2
- @CenterCity
- @CenterState
- @CenterZip
- @CenterPhone
- @CenterContactName
- @CenterContactEmail
- @CenterEmail
- @CenterArCollectporEmail
- @CenterArSpecialistEmail
- @CenterArInboxEmail
- @CenterDirectorName
- @AmountOwed
- @PortalURL
- @CompanyID
- @AccountID
- @ParentFullName
- @ParentEmail
- @ParentPhone
- @Username
- @ParentPinNumber
- @Alt1
- @Alt2

    - @Alt3

When all detail has been entered, select Send- this will forward communication to the selected parents.



* Subject

Following Up

* Message Body

Dear@FamilyName Family,
We will be having a spirit day on 12/30 - please send a crazy hat with your child(ren)!
Thank you!
@CenterName

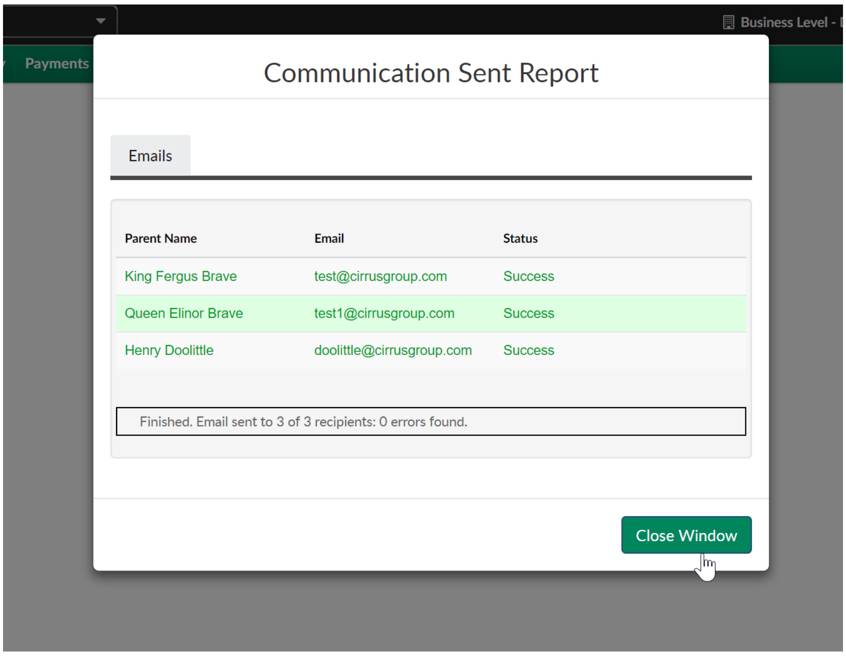
☐ Attach Year End Tax

Tax Year

2017

No file chosen

A confirmation box will appear when all communications have been sent. Press Close Window to continue.

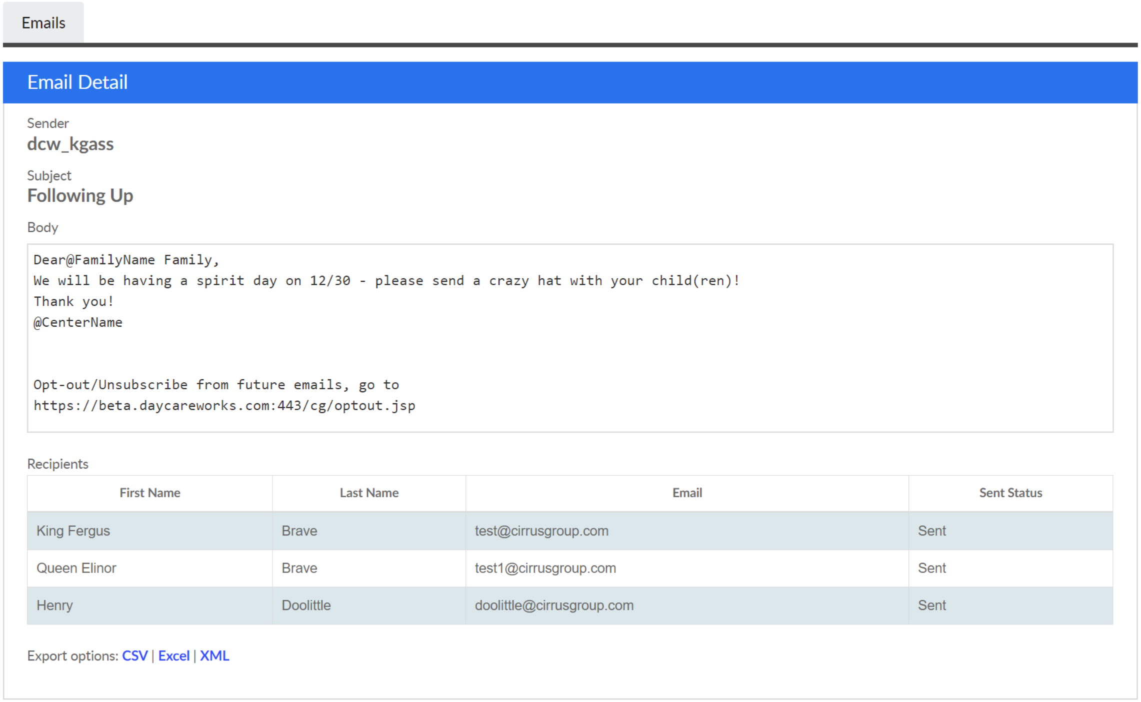


Communication Sent Report

Parent Name	Email	Status
King Fergus Brave	test@cirrusgroup.com	Success
Queen Elinor Brave	test1@cirrusgroup.com	Success
Henry Doolittle	doolittle@cirrusgroup.com	Success

Finished. Email sent to 3 of 3 recipients: 0 errors found.

Email detail will display-



Email Detail

Sender
dcw_kgass

Subject
Following Up

Body

Dear@FamilyName Family,
We will be having a spirit day on 12/30 - please send a crazy hat with your child(ren)!
Thank you!
@CenterName

Opt-out/Unsubscribe from future emails, go to
https://beta.daycareworks.com:443/cg/optout.jsp

Recipients

First Name	Last Name	Email	Sent Status
King Fergus	Brave	test@cirrusgroup.com	Sent
Queen Elinor	Brave	test1@cirrusgroup.com	Sent
Henry	Doolittle	doolittle@cirrusgroup.com	Sent

Export options: CSV | Excel | XML

Communication Setup and Functionality

Last Modified on 12/04/2018 11:14 am EST

For communication warning errors, please review: Email Setup for Clients 📎

The communication screen is where users are able to select and send emails to a center's parents.

There is a configuration option on the Setup > System Config, Extended screen called Allow Parent Email Search Across Centers. This option is considered when only Center/Status are part of the search criteria.

When Room, Category, or Semester are part of the search criteria, the config will not be looked at and the selected search center will be taken as the room center

- If this setting is set to No this will mean that only families with the family center being searched will appear
    - Example- if the Smith family's center is center 1 and the child's program is at center 2, if center 2 is selected in the search criteria the Smith family **will not** display in search results
- If this setting is set to Yes parent emails will display for parents with the family center as the searched center and the program center as the searched center
    - Example- if the Smith family's center is center 1 and the child's program is at center 2, if center 2 is selected in the search criteria the Smith family **will** display in search results

Allow Deposit Payer Search Across Centers: No
Allow Parent Email Search Across Centers: No
Online/POS Payment Search Results Mode: Let the user choose

On the Connect > Communication screen there are also several ways that searching can be impacted.

Below are some scenarios and what to expect when searching from the business level.

- If a specific Center is selected and Active, Active with a Current Schedule, Pending or All Children is selected and the config setting is turned off, ONLY the Family Center will be considered when results display.
- If a specific Center is selected and Active or Pending statuses are selected and the config setting above is turned on the results will display Families with the selected center AND kids attending the selected center with current or future dated schedules.
- If a specific Center is selected and the Active with Current Schedule status is selected and the config setting above is turned on the results will display Families with the selected center AND kids attending the selected center with current schedules.
- If a specific Center is selected and Withdrawn, Inactive or Rejected status is selected, irrespective of config setting, ONLY the Family Center will be considered when results display
- When Tax statement is included, all families with the selected year statement will be included whether they are opted out or not the family or child status is not taken into consideration.
    - If the setting is on, the family could possibly receive their tax statement twice- once from the family center and once from the program's center.

General Tips:

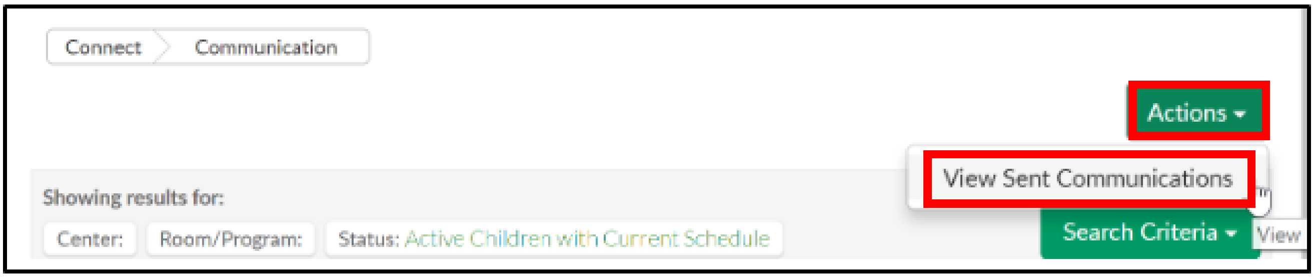
Email>Communication :

Status Filter Detail

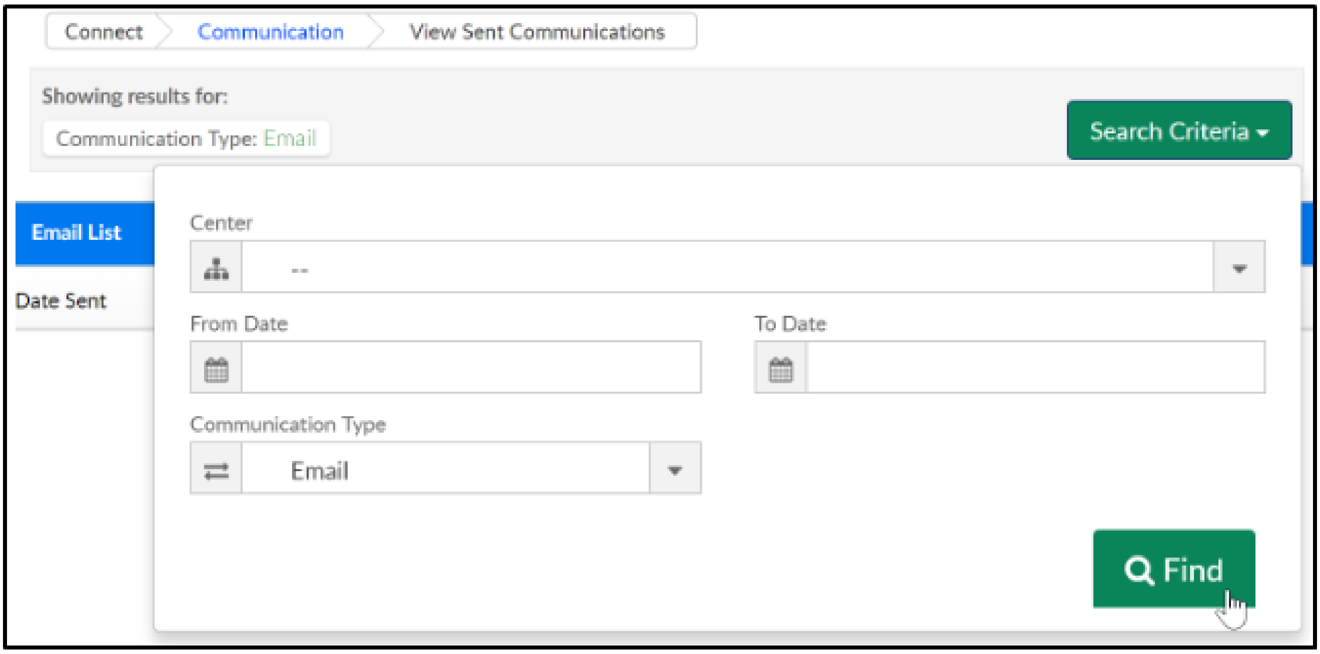
- Active Status-
    - Active Children: The “From and To Date” fields in the search criteria are visible and can be applied only to active children
    - The Active Children, when pulled without a date range, would pull all kids associated to the search criteria
    - When date range given is a partial week, days scheduled are looked at, and records are pulled if atleast one days is scheduled
- Active Children with Current Schedule Status-

- Active Children with Current Schedule-Active room assignments are only considered and not scheduled days

View Sent Filter



The View sent screen has Center, From and To Date search fields

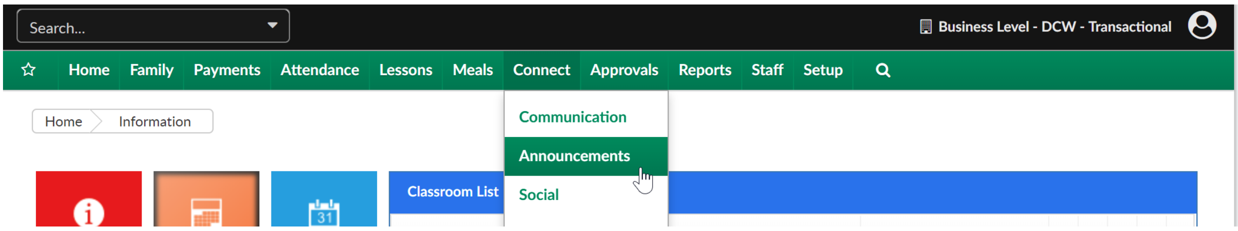


- The center field represents where the email was sent from
- By default, if no from or to date are entered, the results will only display emails sent on the current day, if a date is given, the system will display for that date or the given from and to date range.

Connect > Announcements

Last Modified on 03/30/2018 8:49 am EDT

The Announcements section from the Connect menu will allow admin/staff users to enter announcements to the parent portal, staff portal or to the admin side of the site. From the Connect menu select announcements-

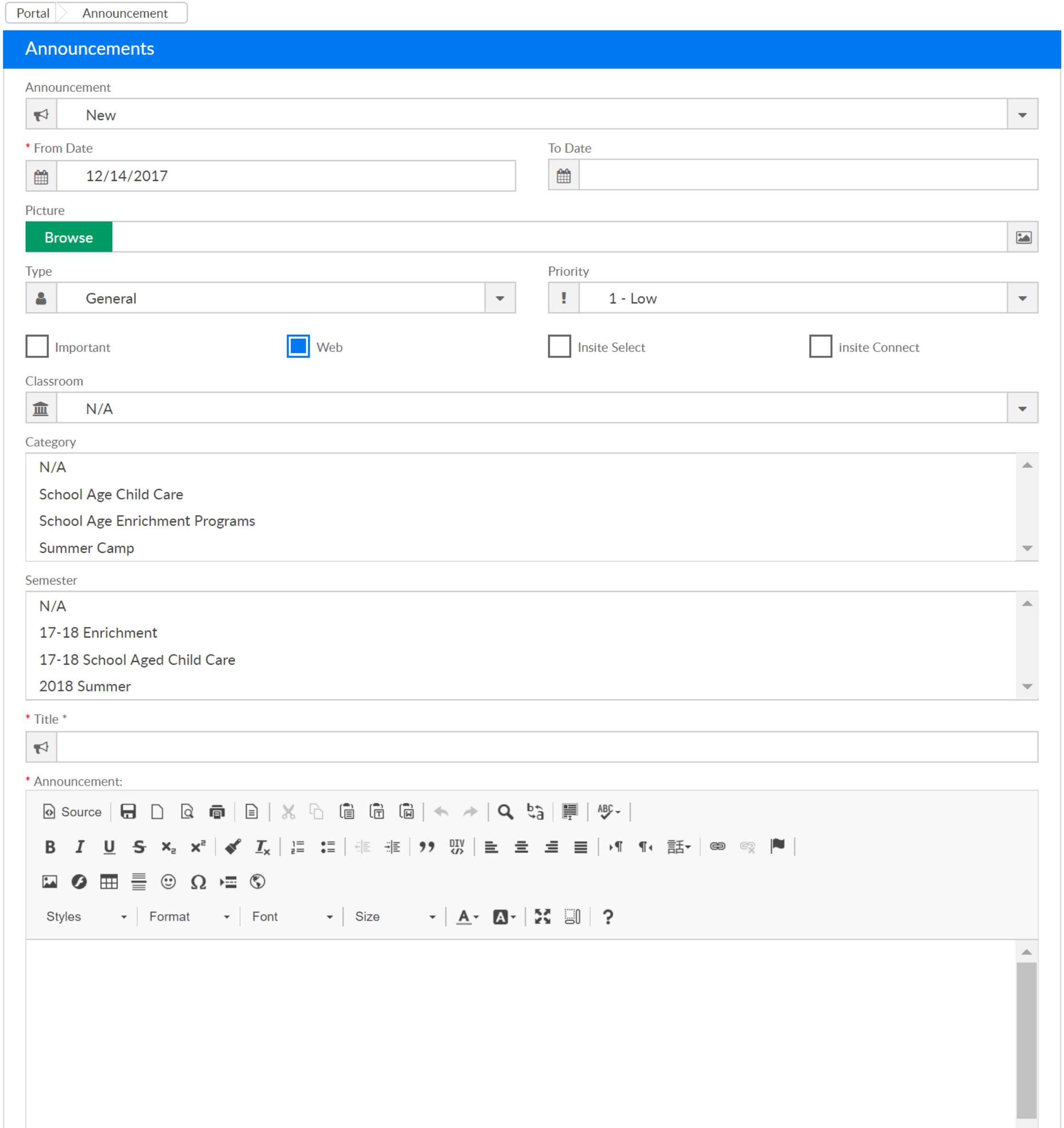


To add a new announcement complete fields on the Announcement page. The available fields are below-

- From Date- date the announcement should begin to display
- To Date- date the announcement should stop displaying
- Picture- select Browse to find a photo to upload to the announcement
- Type
    - General- this type of announcement will display on the parent portal to families (family.daycareworks.com/connect.schoolcareworks.com)
    - Teacher/Vendor- this type of announcement will display on the teacher/vendor portal (family.daycareworks.com/connect.schoolcareworks.com)
    - Internal- this type of announcement will display on the admin side (daycareworks.com/schoolcareworks.com)
- Priority- this will decide where the announcement will display 1 (Low)- will display below a 5 (High)
- Classroom- leave field set to N/A if the announcement should display to everyone, if the announcement should display to families associated to a specific classroom- select a classroom
- Category- leave field set to N/A if the announcement should display to everyone, if the announcement should display to families associated to a specific category- select a category
- Semester- leave field set to N/A if the announcement should display to everyone,

if the announcement should display to families associated to a specific semester- select a semester

- Title- add a title that should display (a subject)
- Announcement- add the text that should display- specific detail, this can include images, links and extra detail



Announcement: New

* From Date: 12/14/2017

To Date:

Picture:

Type: General

Priority: 1 - Low

☐ Important ☑ Web ☐ Insite Select ☐ insite Connect

Classroom: N/A

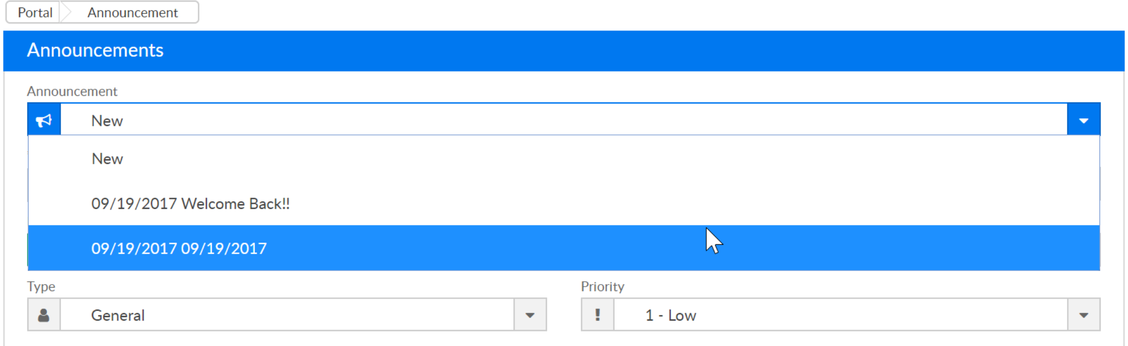
Category:
N/A
School Age Child Care
School Age Enrichment Programs
Summer Camp

Semester:
N/A
17-18 Enrichment
17-18 School Aged Child Care
2018 Summer

* Title *

* Announcement:

To edit an announcement, select the announcement from the drop-down menu.



Announcement: New

New

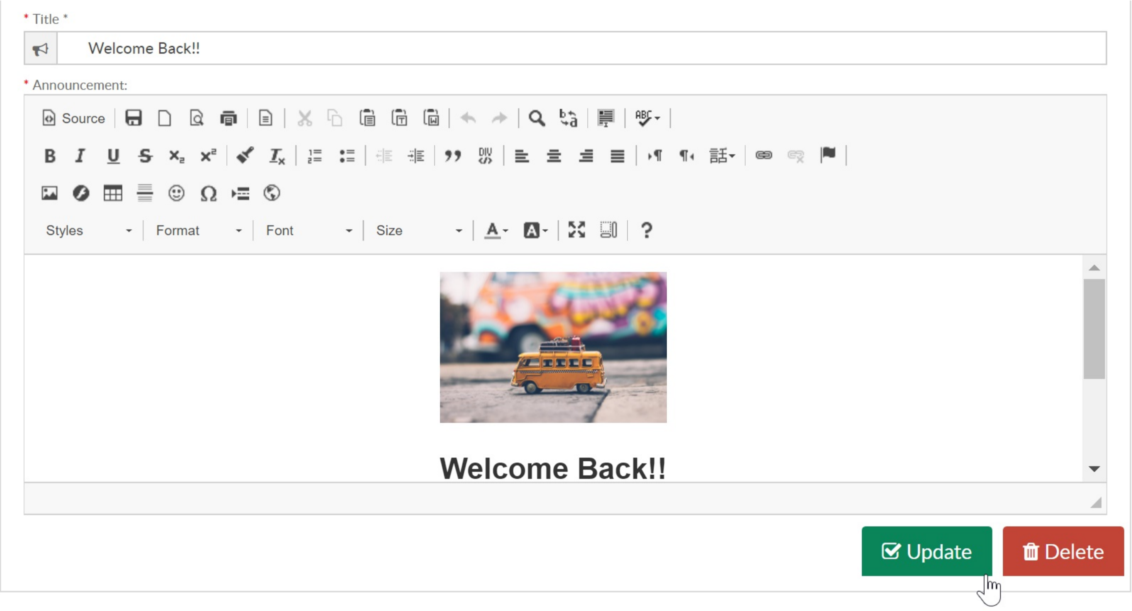
09/19/2017 Welcome Back!!

09/19/2017 09/19/2017

Type: General

Priority: 1 - Low

Once the announcement has been selected, scroll to the Title and Announcement fields and edit as needed. Be sure to select Update. If the announcement should be deleted, press delete. The changes in this section should be immediately displayed in the parent portal, staff portal or internally.

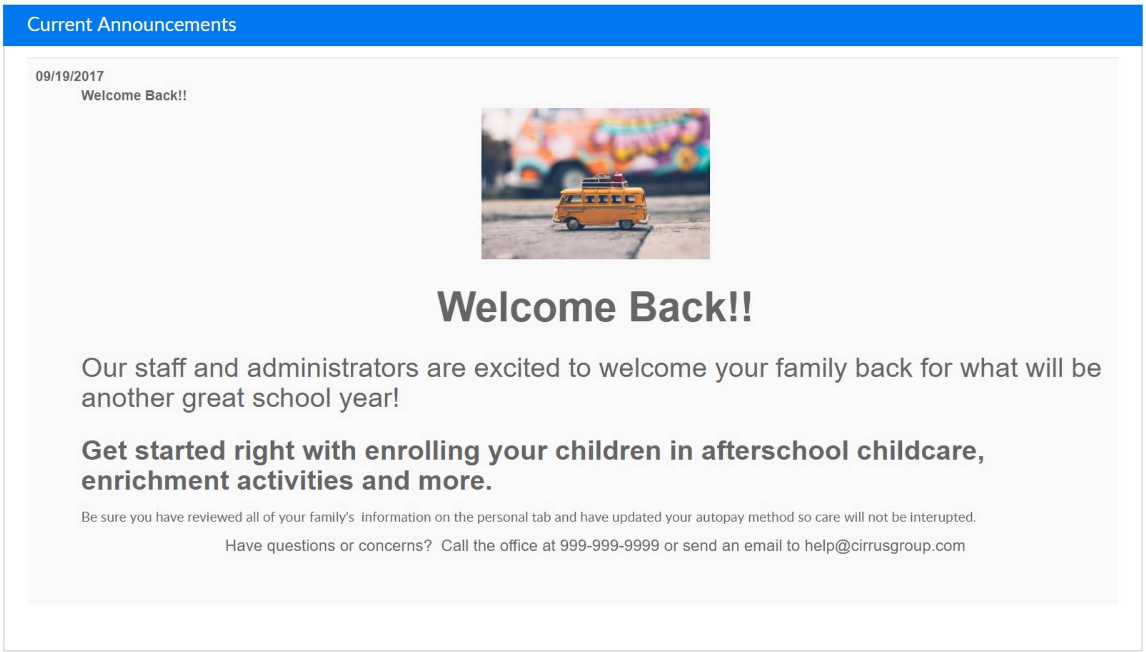


* Title *: Welcome Back!!

* Announcement:

Welcome Back!!

A preview of the announcements in the system will display in the Current Announcements section.



09/19/2017

Welcome Back!!

Welcome Back!!

Our staff and administrators are excited to welcome your family back for what will be another great school year!

Get started right with enrolling your children in afterschool childcare, enrichment activities and more.

Be sure you have reviewed all of your family's information on the personal tab and have updated your autopay method so care will not be interupted.

Have questions or concerns? Call the office at 999-999-9999 or send an email to help@cirrusgroup.com

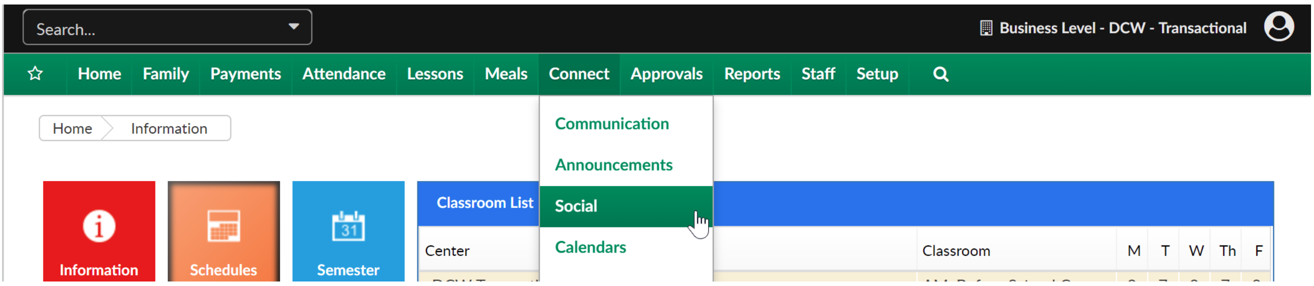
Connect > Social

Last Modified on 03/30/2018 8:49 am EDT

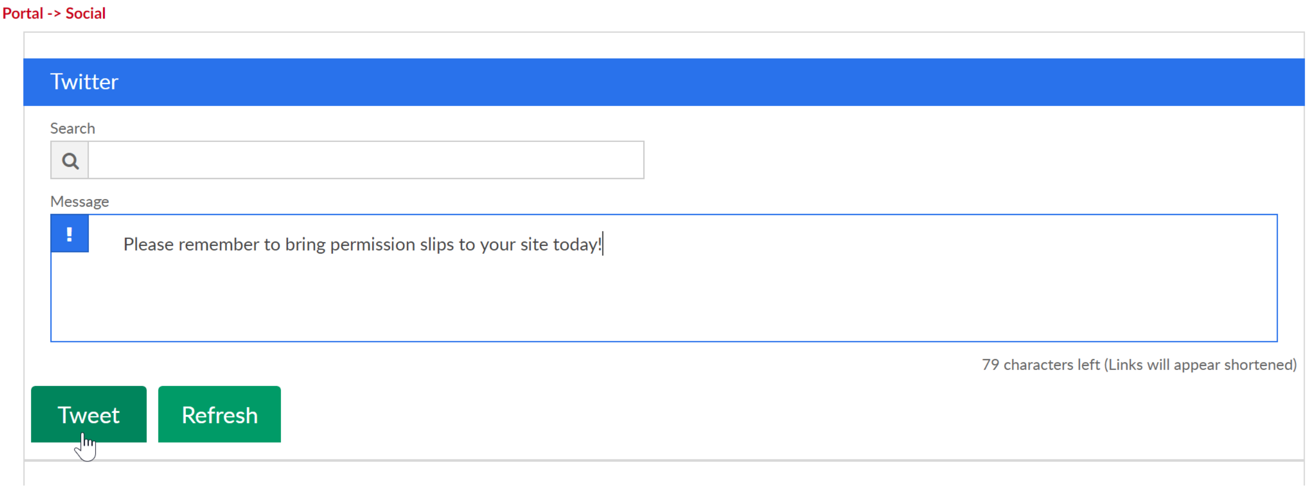
The Social screen allows users to interact with parents via Twitter.

From the Connect menu, select Social.

Before this can be done an admin needs to add a Twitter account by going to setup > system config, then selecting social.



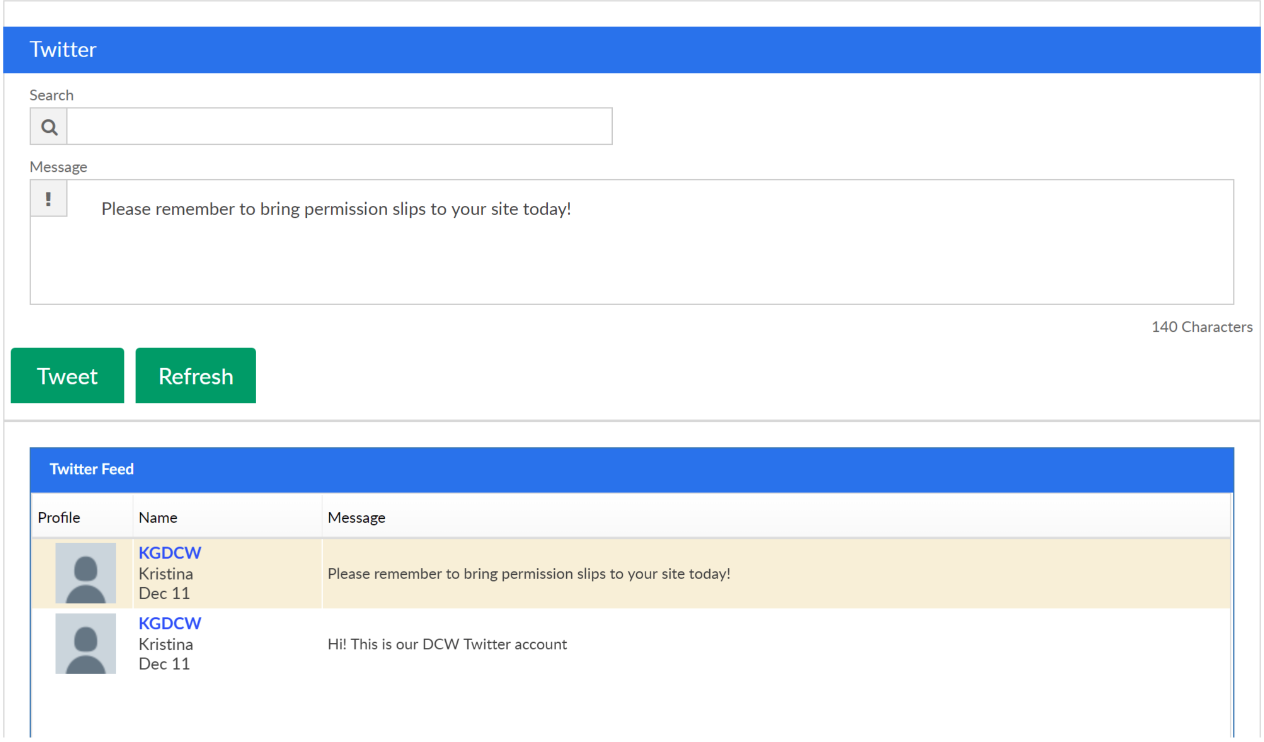
To add a tweet to the Twitter time line enter message and press Tweet.



Message: Please remember to bring permission slips to your site today!

79 characters left (Links will appear shortened)

The updated feed will display in the Twitter Feed area-



Please remember to bring permission slips to your site today!

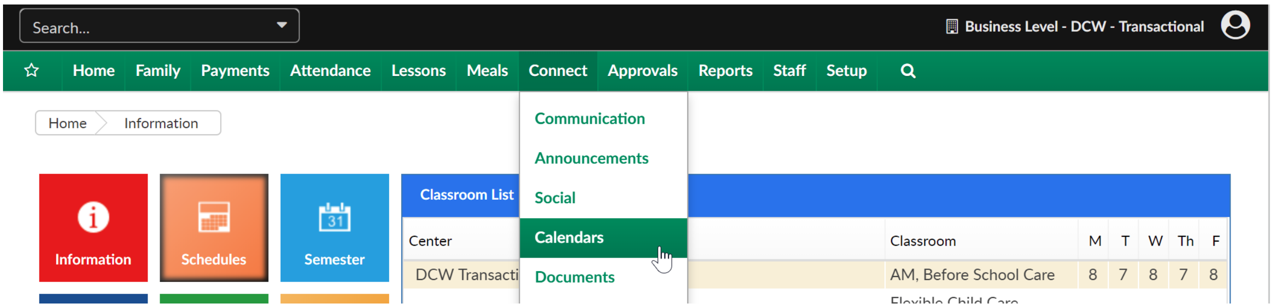
Profile	Name	Message
	KGDCW Kristina Dec 11	Please remember to bring permission slips to your site today!
	KGDCW Kristina Dec 11	Hi! This is our DCW Twitter account

Connect > Calendars

Last Modified on 03/30/2018 8:50 am EDT

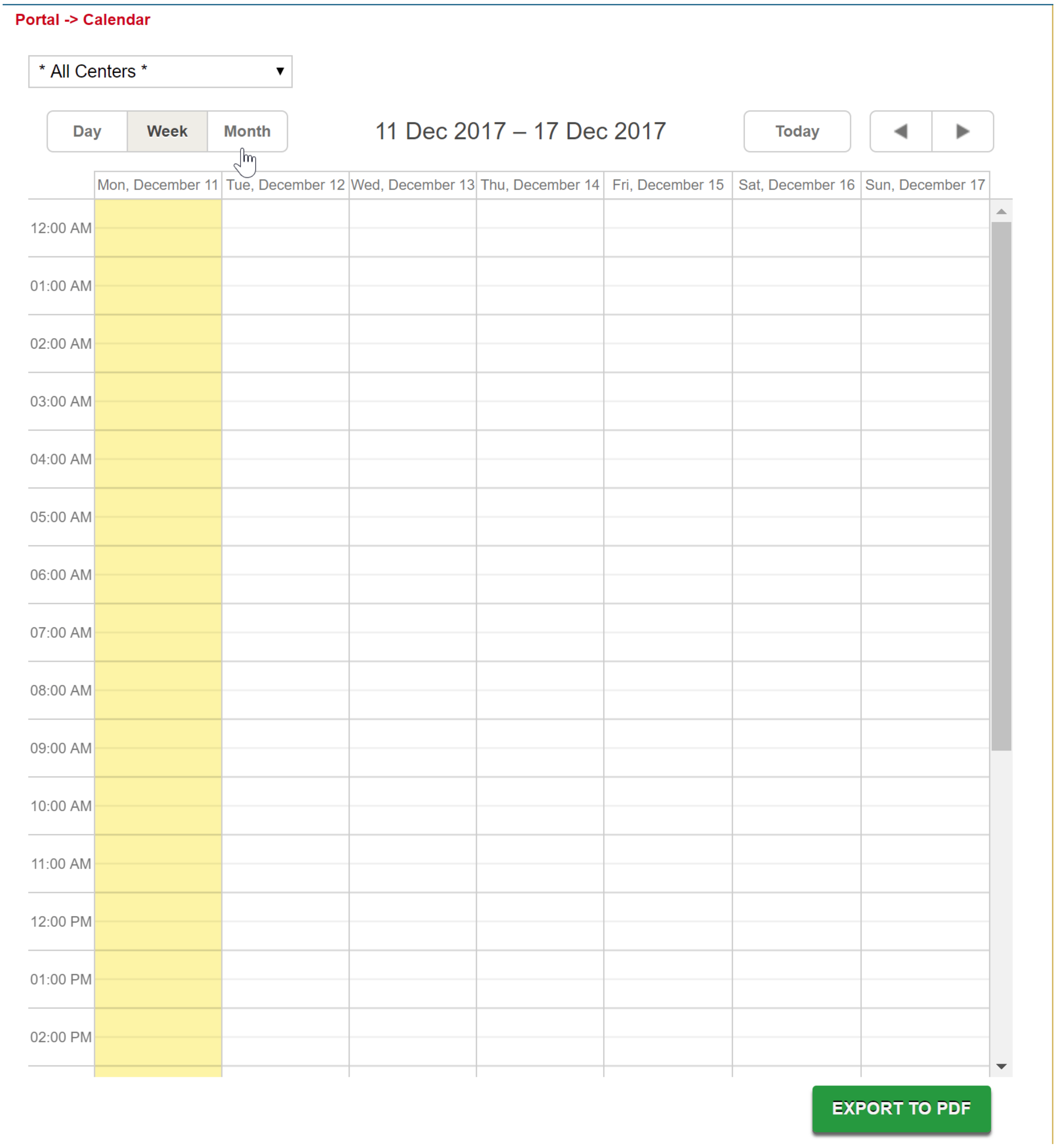
An online calendar can be setup by administrators to show parents and staff upcoming events through the online portal.

From the Connect menu, select the calendars option.

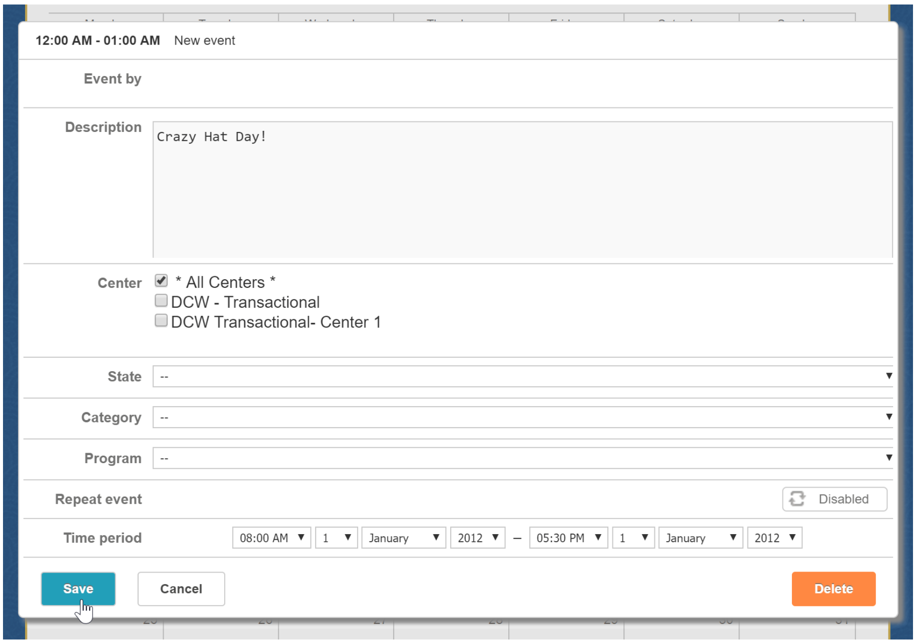


On the Calendars screen select the view-

- Select a center from the drop-down list
- Choose to display by Day, Week or Month



In any view, double-click on the day the event will be added on, this will bring up the edit box.



12:00 AM - 01:00 AM New event

Event by

Description: Crazy Hat Day!

Center: ☑ * All Centers *
☐ DCW - Transactional
☐ DCW Transactional- Center 1

State: --

Category: --

Program: --

Repeat event: Disabled

Time period: 08:00 AM 1 January 2012 – 05:30 PM 1 January 2012

- Description- enter text for what a parent should see through the portal
- Center (optional)- select which centers should see the event
- State (optional)
- Category (optional)- select if the event should be limited to a specific category
- Program (optional)- select if the event should be limited to a specific program
- Repeat Event- select the disabled button to enable- choose the frequency
- Time Period- enter the date and time the event will take place

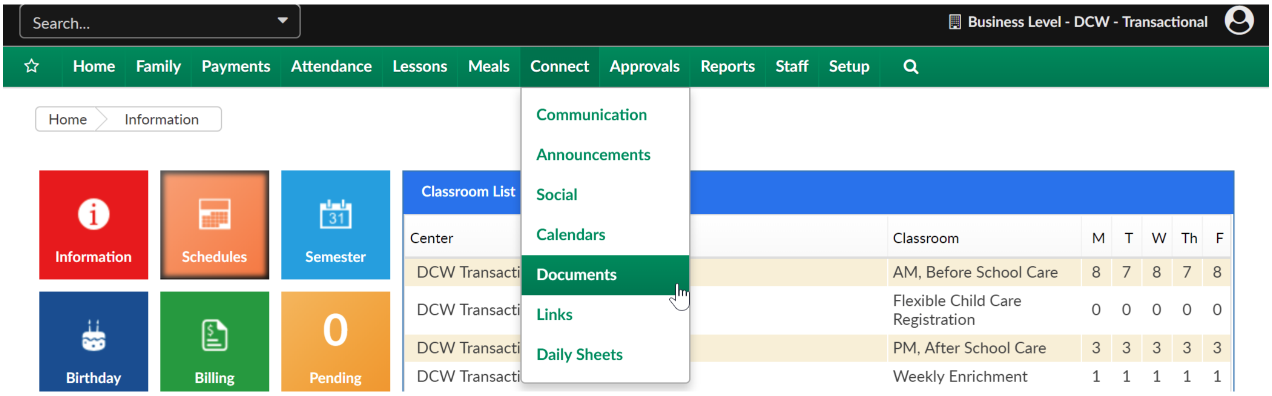
Once complete, press Save to commit changes to the event.

Connect > Documents

Last Modified on 03/30/2018 8:50 am EDT

The Documents screen allows user to add generic documents for parents to access from the parent portal.

From the Connect menu, select the Documents option.



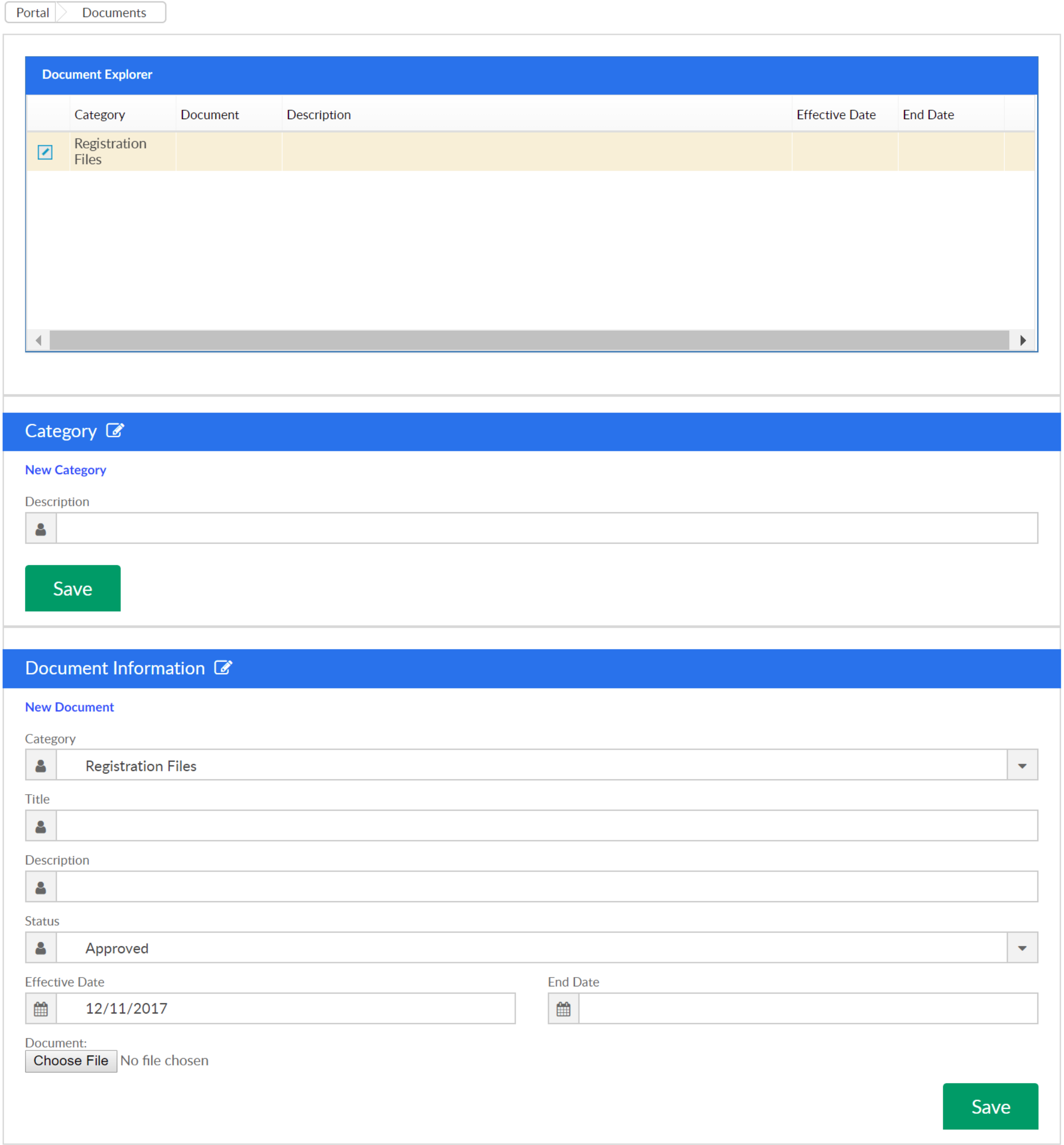
Center	Classroom	M	T	W	Th	F
DCW Transacti	AM, Before School Care	8	7	8	7	8
DCW Transacti	Flexible Child Care Registration	0	0	0	0	0
DCW Transacti	PM, After School Care	3	3	3	3	3
DCW Transacti	Weekly Enrichment	1	1	1	1	1

On the Documents screen, the first section will display categories that have already been added to the system. This will help users to group documents for parents.

To add a new Category, select the New Category option, type the category name in the Description box- then press Save.

The third section of the screen will allow users to upload documents (in PDF or Word format).

- Select a category
- Add a title
- Add a description
- Select a Status
- Enter an Effective and End date (respectively)
- Choose the document from a computer or drive location
- Press Save



	Category	Document	Description	Effective Date	End Date
☑	Registration Files				

Category: Registration Files

Title:

Description:

Status: Approved

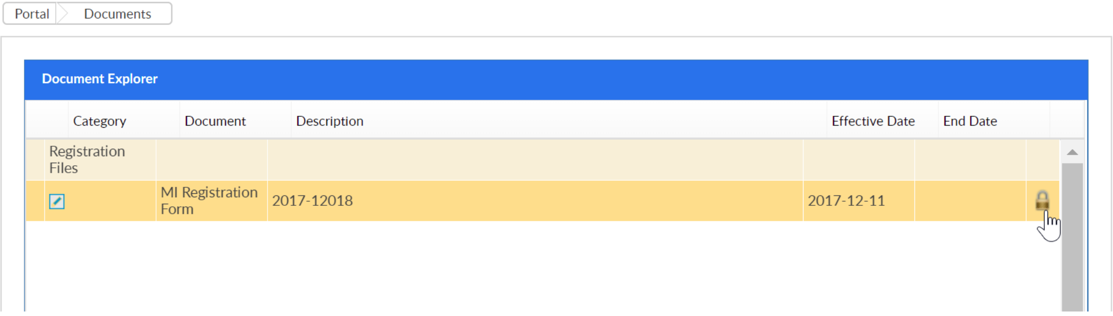
Effective Date: 12/11/2017

End Date:

Document: Choose File No file chosen

As soon as documents have been uploaded they will be available for parents to see on the Parent Portal in the Communication tab.

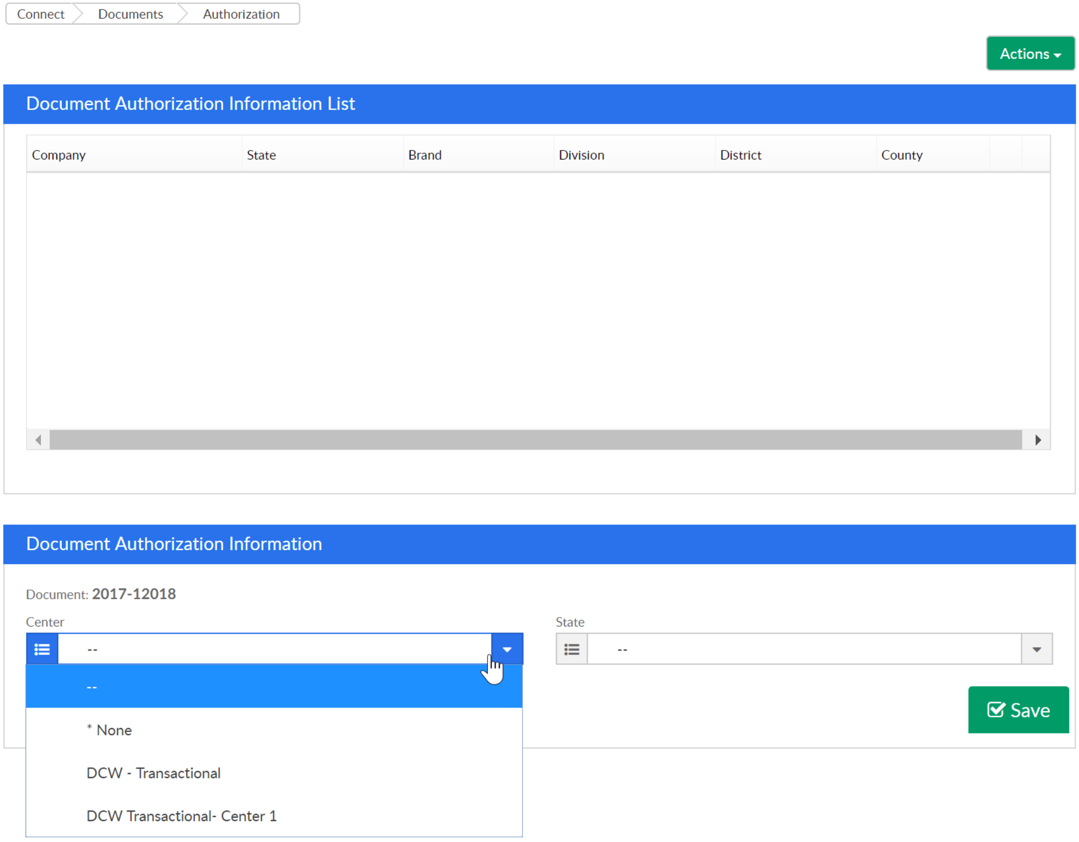
Sites can also choose to restrict access to certain documents by selecting the lock icon on the document's line-



	Category	Document	Description	Effective Date	End Date	
	Registration Files					
☑		MI Registration Form	2017-12018	2017-12-11		🔒

Select the Center or State that should be able to see the document- then press Save.

Only sites that meet this criteria will display the document on the parent portal.



Document Authorization Information List

Company	State	Brand	Division	District	County

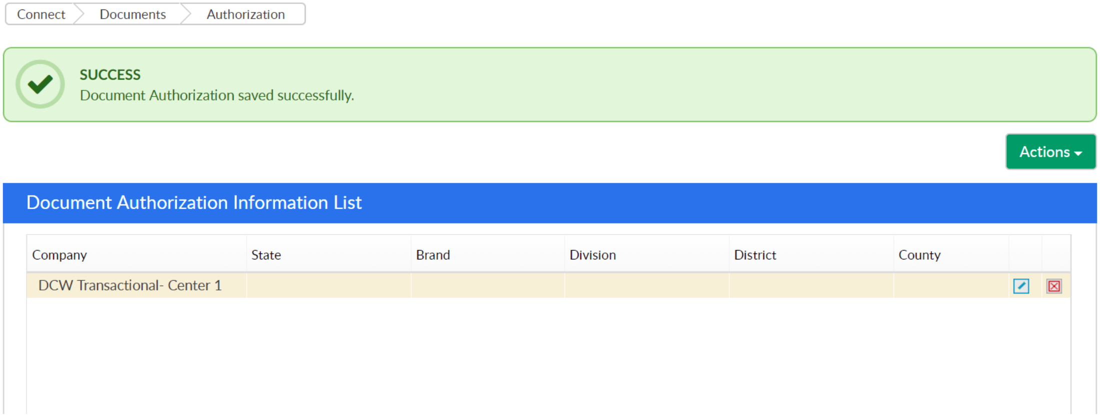
Document Authorization Information

Document: **2017-12018**

Center: --

State: --

To edit an authorization press the green square, to delete- press the red x.

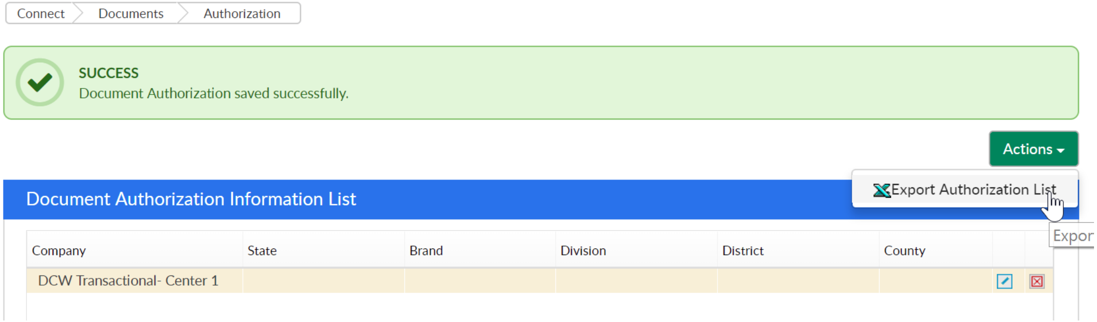


SUCCESS
Document Authorization saved successfully.

Document Authorization Information List

Company	State	Brand	Division	District	County
DCW Transactional- Center 1					

Press the Actions button and select the option to Export Authorization List to see the list of authorized sites or states in excel format.



SUCCESS
Document Authorization saved successfully.

Document Authorization Information List

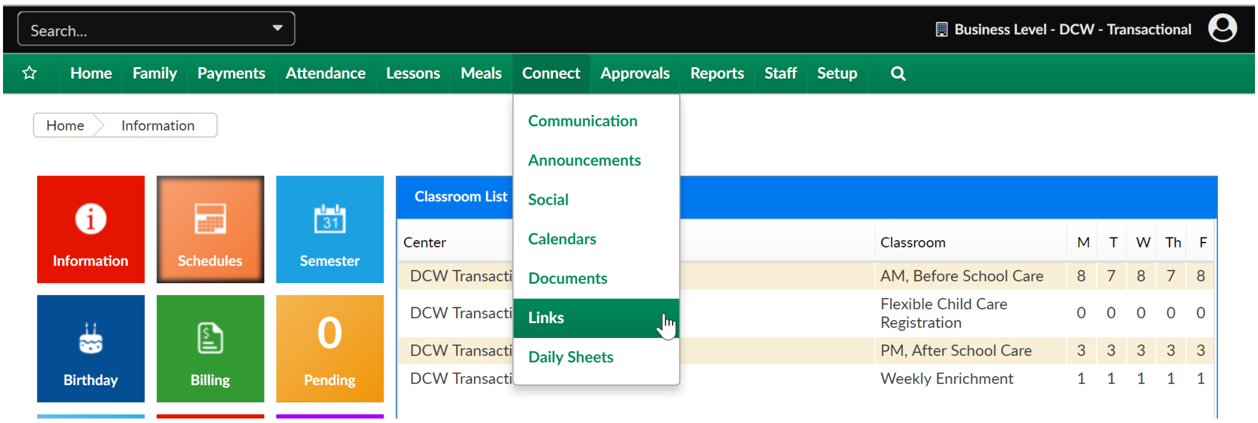
Company	State	Brand	Division	District	County
DCW Transactional- Center 1					

Note: If your site has brands, districts or divisions additional fields will display.

Connect > Links

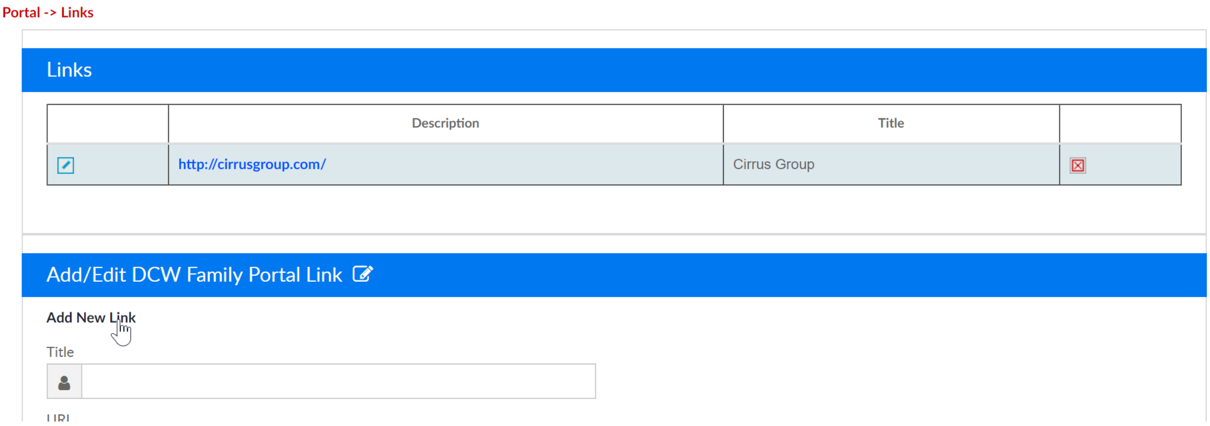
Last Modified on 12/14/2017 8:37 am EST

The Connect > Links screen allows admins to add web links to the parent portal that parents may find helpful. To add or edit a link on the parent portal select the Links option from the Connect menu.



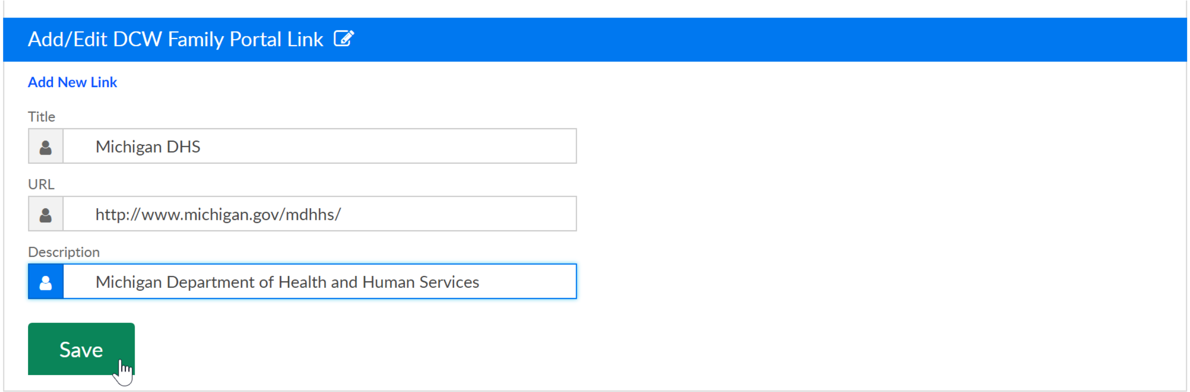
Center	Classroom	M	T	W	Th	F
DCW Transacti	AM, Before School Care	8	7	8	7	8
DCW Transacti	Flexible Child Care Registration	0	0	0	0	0
DCW Transacti	PM, After School Care	3	3	3	3	3
DCW Transacti	Weekly Enrichment	1	1	1	1	1

To add a new link to the portal, click the Add New Link text-



	Description	Title	
☐	http://cirrusgroup.com/	Cirrus Group	☒

Enter a title, URL and short description for the link, then press Save.

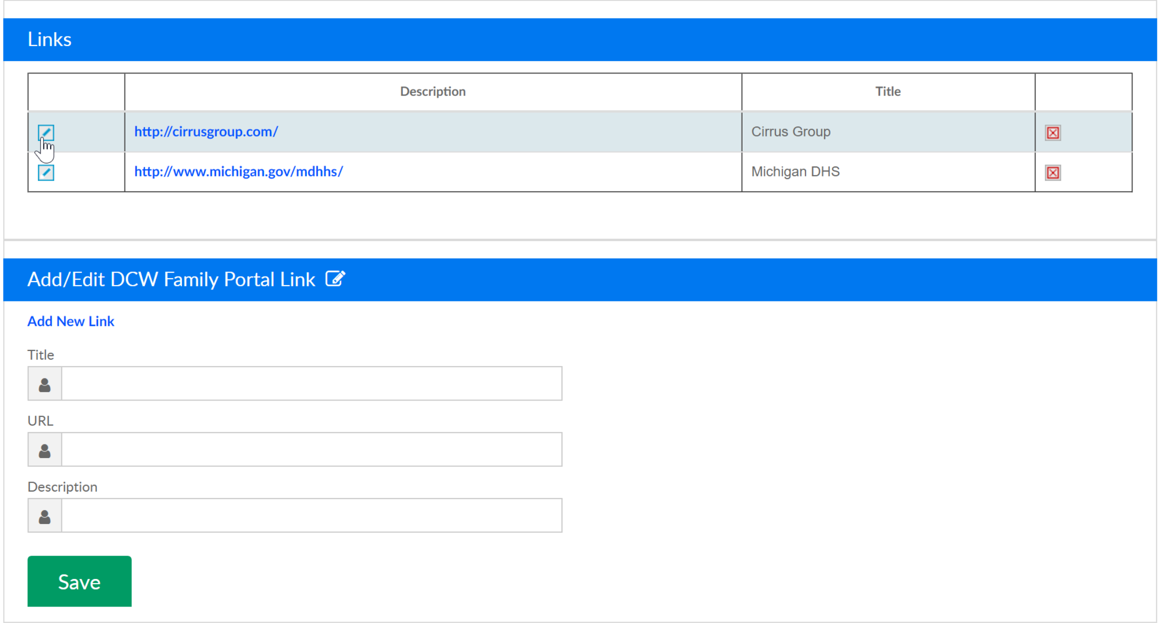


Title: Michigan DHS

URL: http://www.michigan.gov/mdhhs/

Description: Michigan Department of Health and Human Services

To edit a link, press the edit icon- update the Title, URL or Description, then Save. Any changes made are immediate and will be displayed the next time a parent navigates to the Communication tile on the parent porta l.



Links

	Description	Title	
✎	http://cirrusgroup.com/	Cirrus Group	☒
✎	http://www.michigan.gov/mdhhs/	Michigan DHS	☒

Add/Edit DCW Family Portal Link

Add New Link

Title

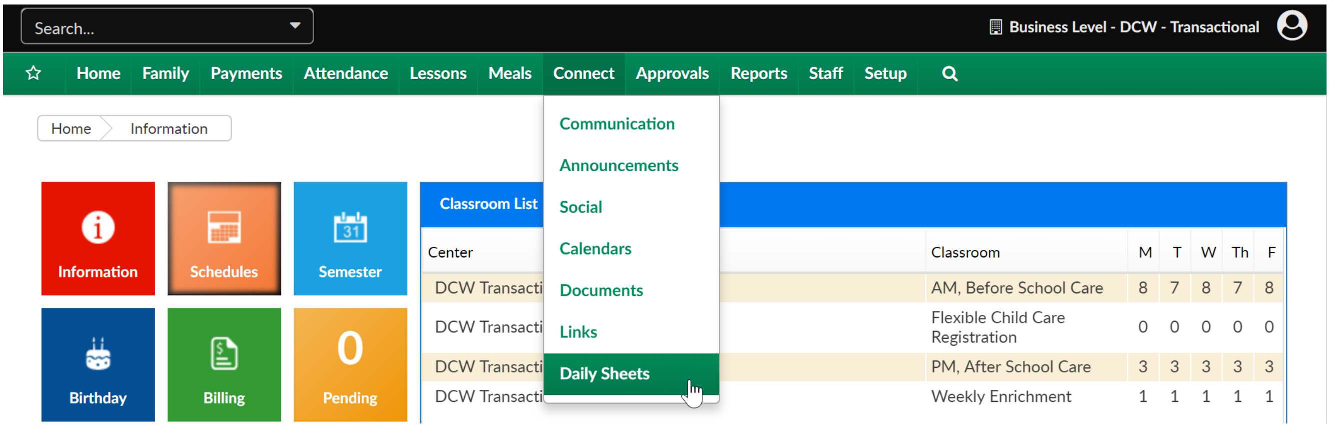
URL

Description

Connect > Daily Sheets

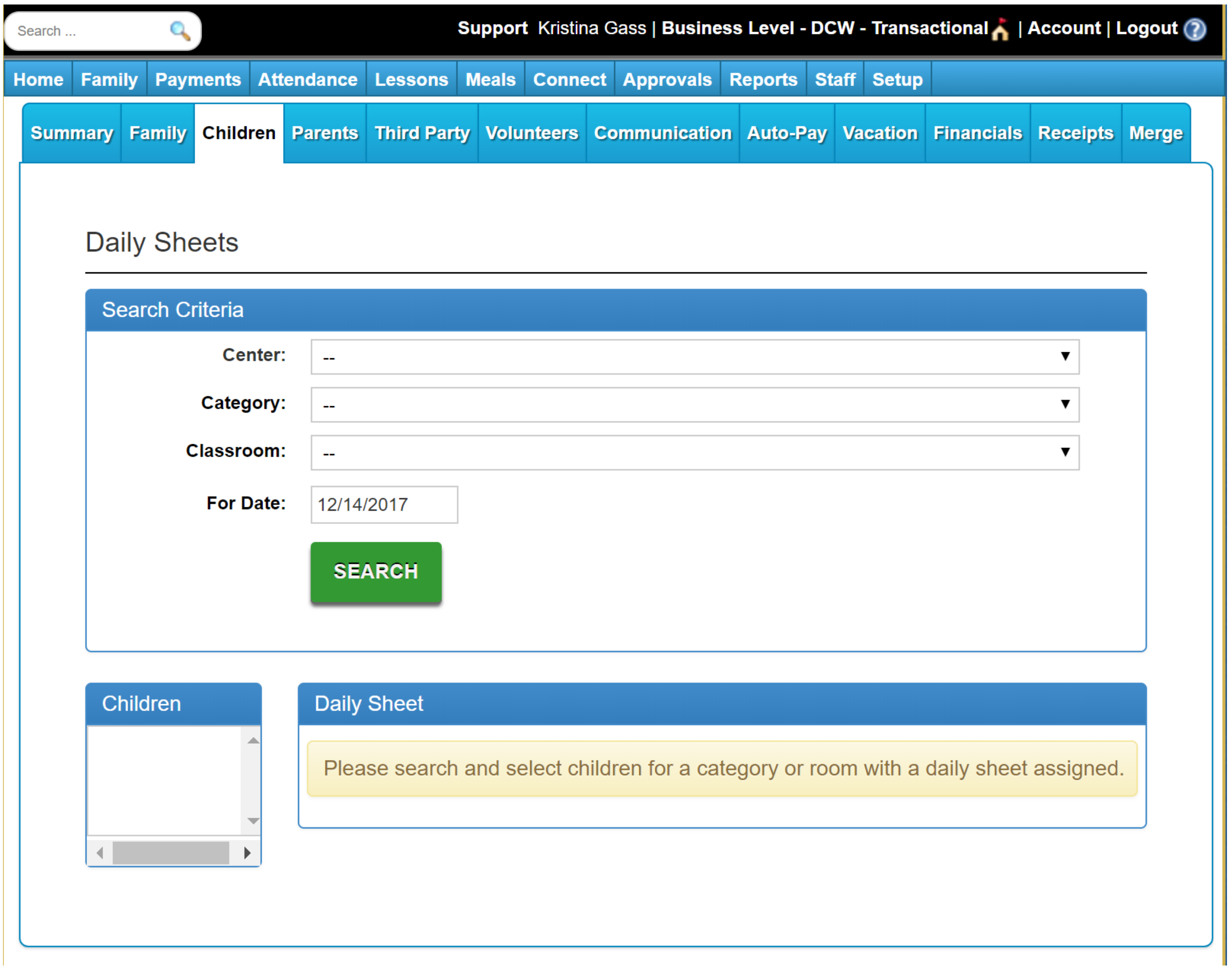
Last Modified on 12/14/2017 10:07 am EST

The Daily Sheets option on the Connect menu will allow administrators to add Daily Insites for children from the admin side. From the Connect menu select the Daily Sheets option.



Center	Classroom	M	T	W	Th	F
DCW Transacti	AM, Before School Care	8	7	8	7	8
DCW Transacti	Flexible Child Care Registration	0	0	0	0	0
DCW Transacti	PM, After School Care	3	3	3	3	3
DCW Transacti	Weekly Enrichment	1	1	1	1	1

On the Daily Sheets page select a center, category, classroom and for date- then press Search.



Center: --

Category: --

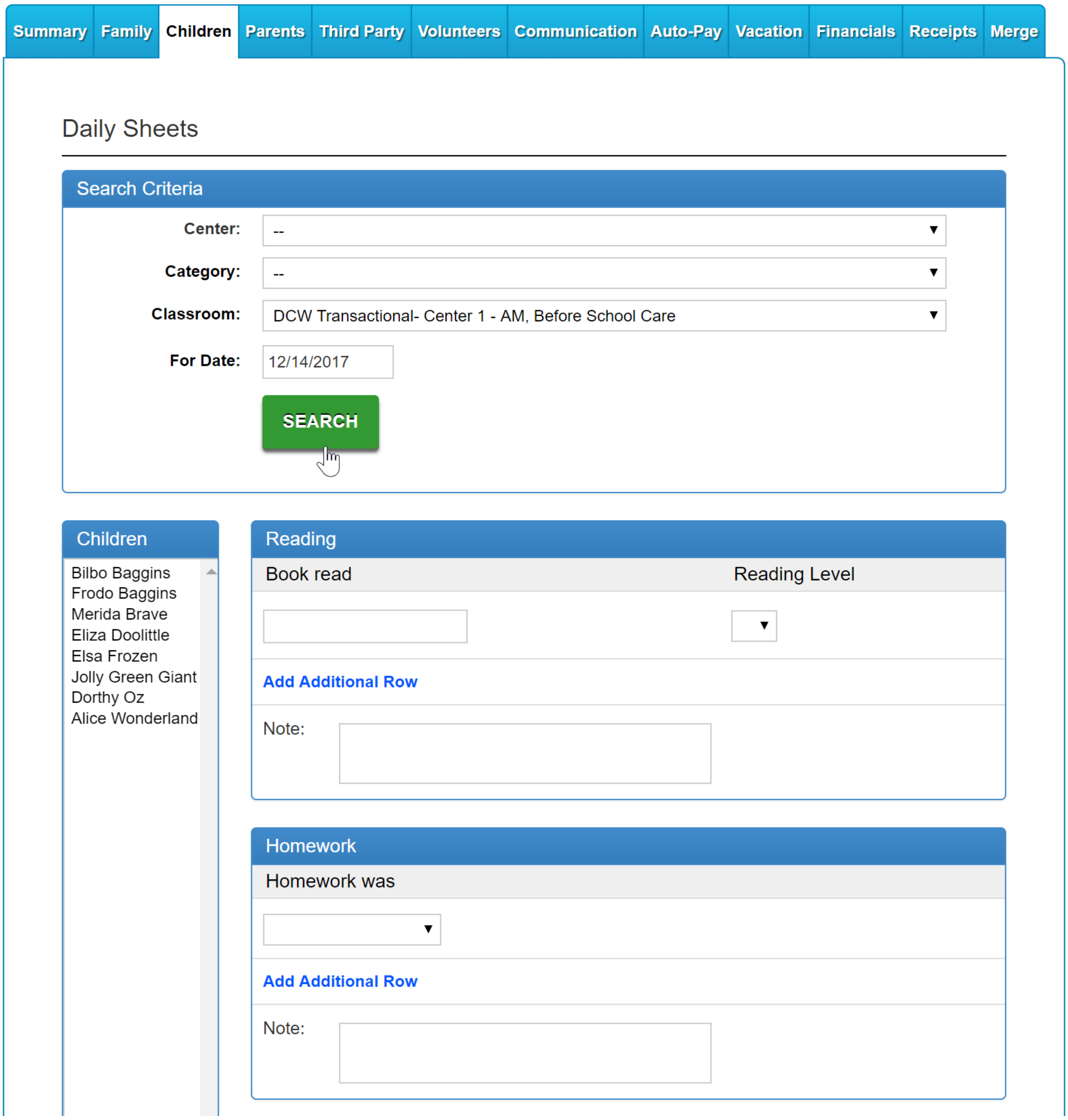
Classroom: --

For Date: 12/14/2017

Please search and select children for a category or room with a daily sheet assigned.

Once search is selected, children that match the entered criteria will display in the

Children section.



Daily Sheets

Search Criteria

Center: --

Category: --

Classroom: DCW Transactional- Center 1 - AM, Before School Care

For Date: 12/14/2017

Children

Bilbo Baggins
Frodo Baggins
Merida Brave
Eliza Doolittle
Elsa Frozen
Jolly Green Giant
Dorthy Oz
Alice Wonderland

Reading

Book read	Reading Level

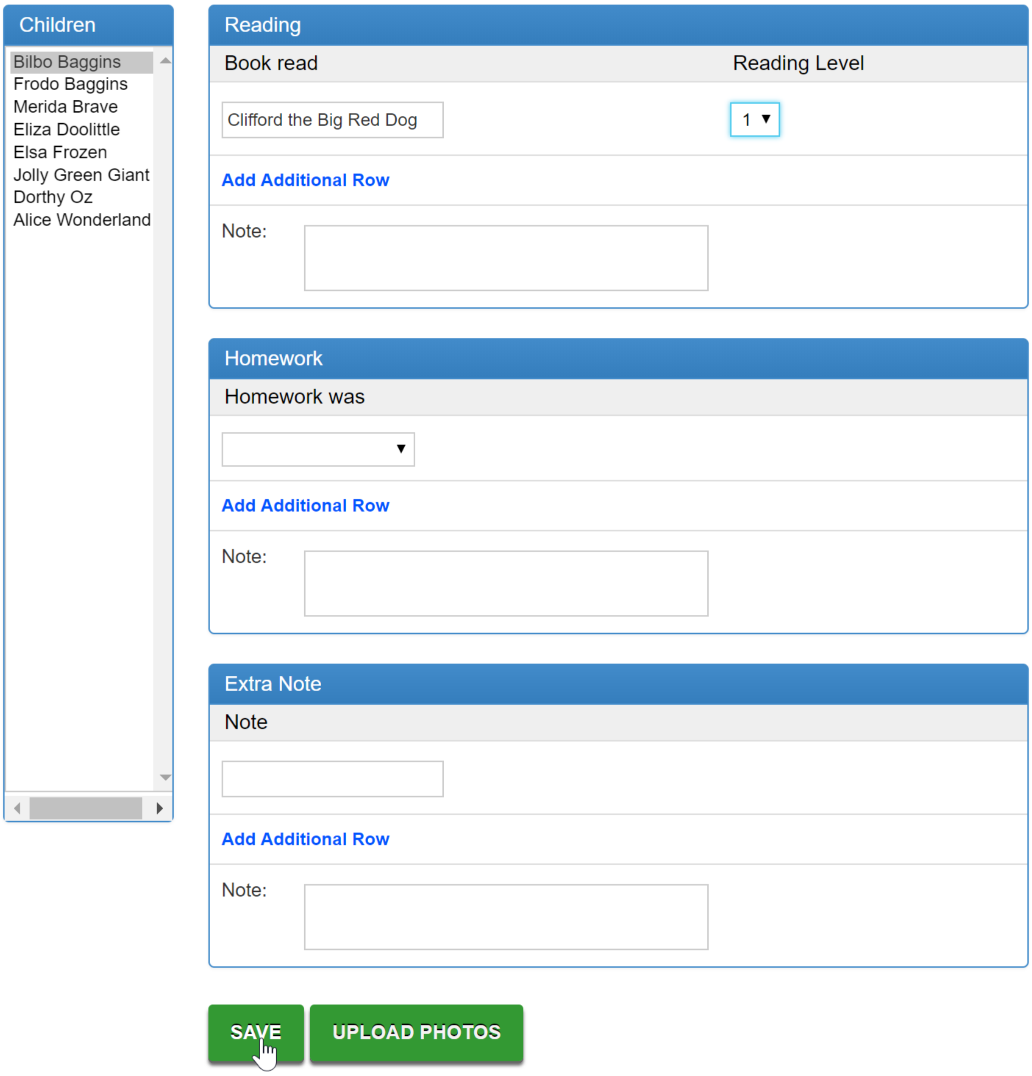
Note:

Homework

Homework was

Note:

To enter a new daily insite, select a child (or multiple children) from the Children list, then enter the detail in the related insite. Once complete, press Save.



Bilbo Baggins
Frodo Baggins
Merida Brave
Eliza Doolittle
Elsa Frozen
Jolly Green Giant
Dorthy Oz
Alice Wonderland

Book read	Reading Level
Clifford the Big Red Dog	1

Note:

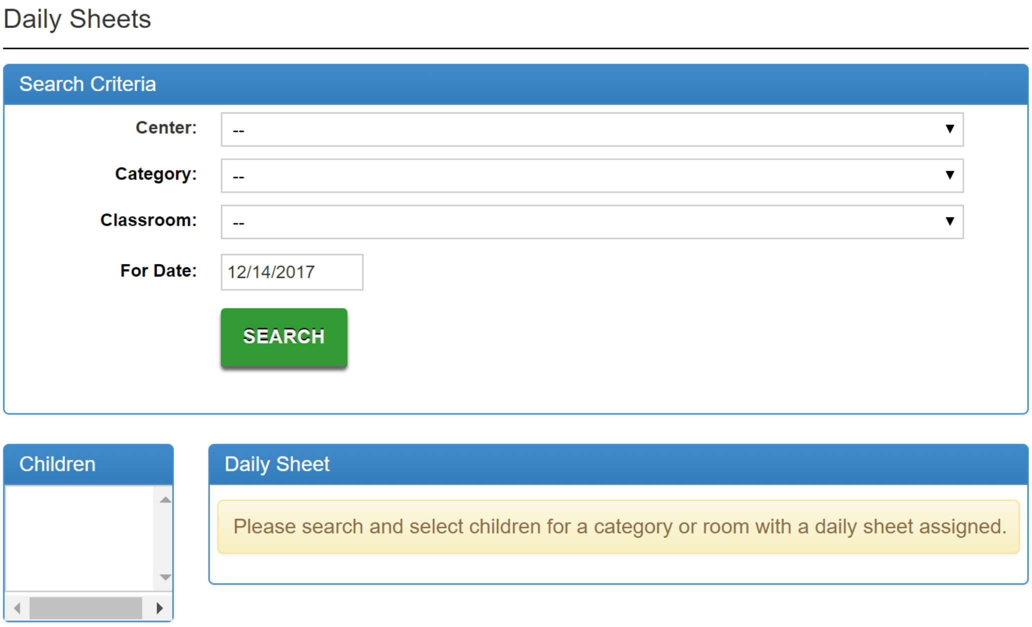
Homework was

Note:

Note

Note:

Once Save is selected, the search screen will display again.



Center: --
Category: --
Classroom: --
For Date: 12/14/2017

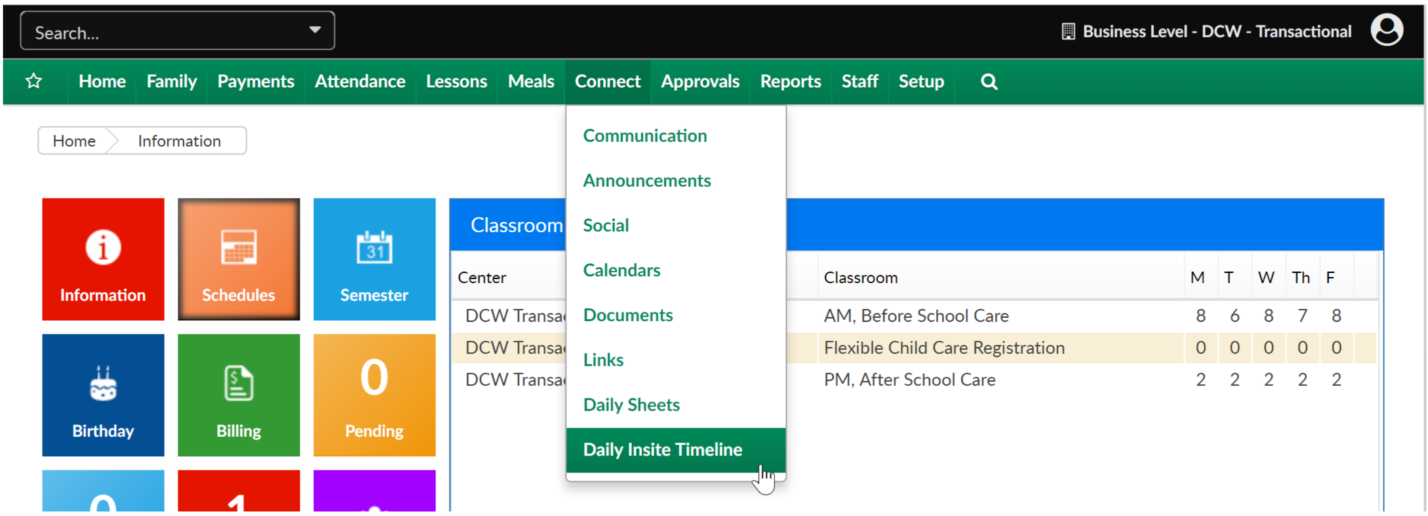
Please search and select children for a category or room with a daily sheet assigned.

Connect > Daily InSite Timeline

Last Modified on 03/13/2018 10:19 am EDT

The Daily InSite Timeline screen will display a summary of the daily insite detail that has been recorded throughout the selected day.

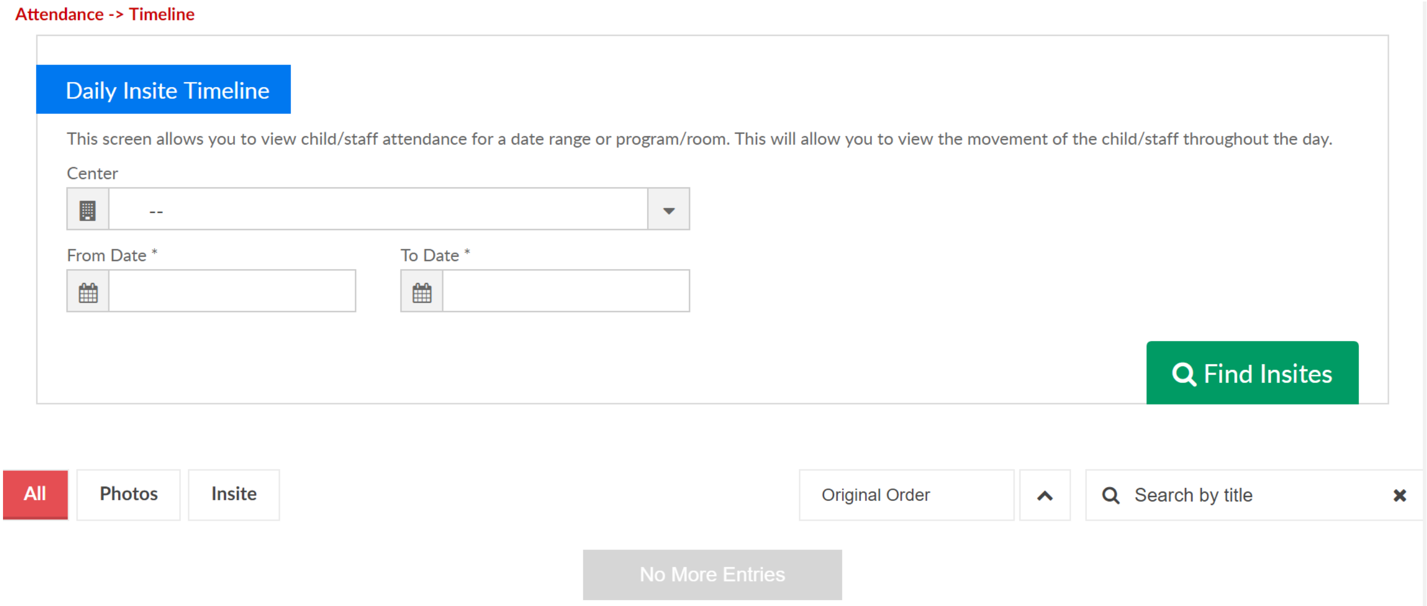
From the Connect menu select the Daily InSite Timeline option.



Center	Classroom	M	T	W	Th	F
DCW Transa	AM, Before School Care	8	6	8	7	8
DCW Transa	Flexible Child Care Registration	0	0	0	0	0
DCW Transa	PM, After School Care	2	2	2	2	2

On the Daily InSite Timeline the below criteria can be selected-

- Center
- From Date
- To Date



This screen allows you to view child/staff attendance for a date range or program/room. This will allow you to view the movement of the child/staff throughout the day.

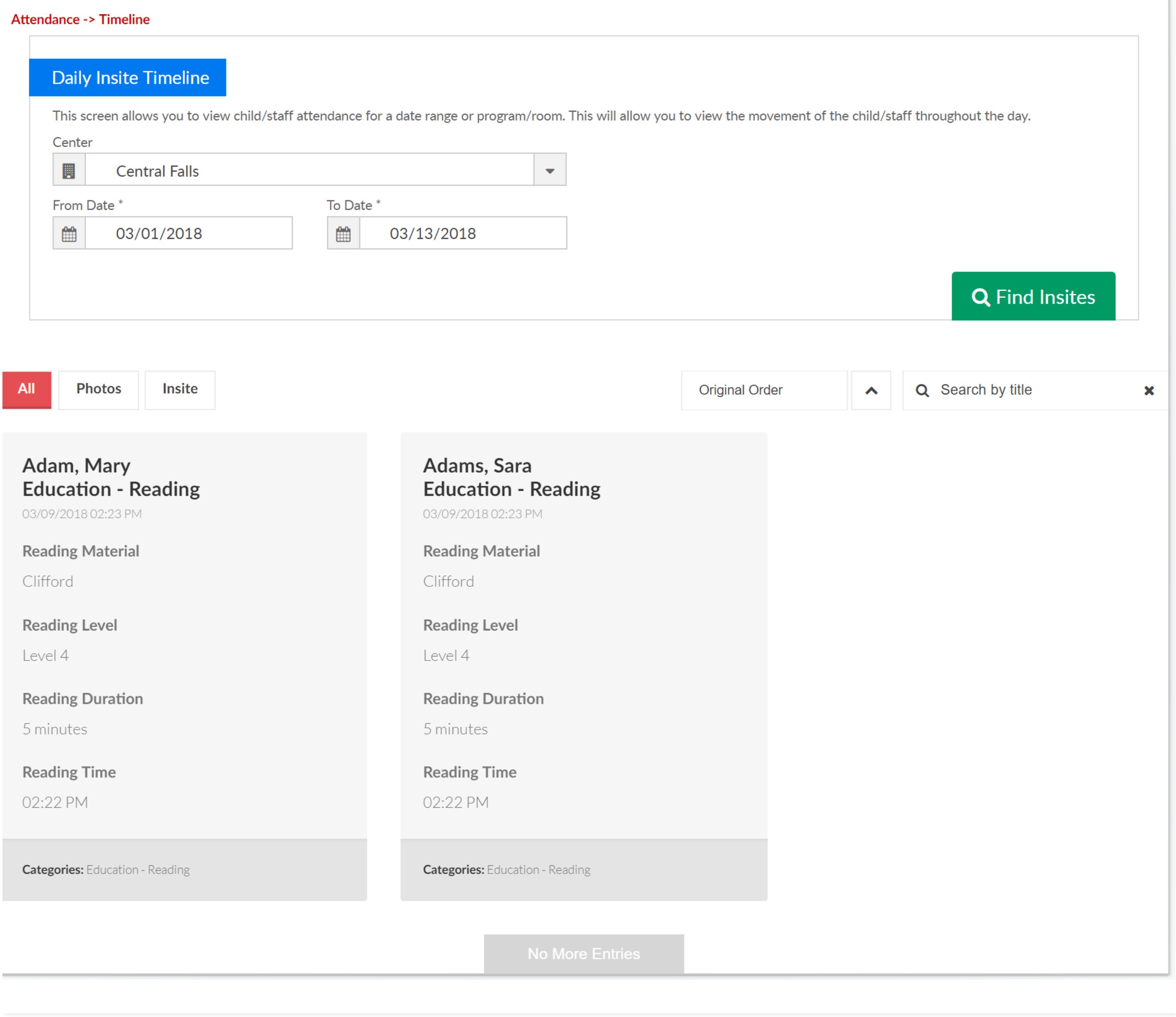
Center: --

From Date *

To Date *

Once Find Insites is selected, admins can flip between All, Photos or Insites.

Attendance -> Timeline



This screen allows you to view child/staff attendance for a date range or program/room. This will allow you to view the movement of the child/staff throughout the day.

Center: Central Falls

From Date *: 03/01/2018

To Date *: 03/13/2018

Adam, Mary
Education - Reading
03/09/2018 02:23 PM

Reading Material: Clifford

Reading Level: Level 4

Reading Duration: 5 minutes

Reading Time: 02:22 PM

Categories: Education - Reading

Adams, Sara
Education - Reading
03/09/2018 02:23 PM

Reading Material: Clifford

Reading Level: Level 4

Reading Duration: 5 minutes

Reading Time: 02:22 PM

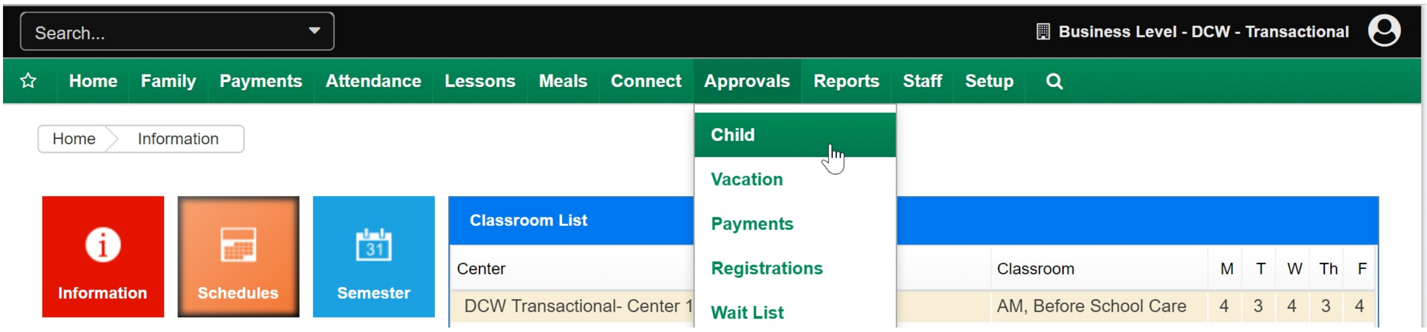
Categories: Education - Reading

Approvals > Child

Last Modified on 12/11/2017 8:12 am EST

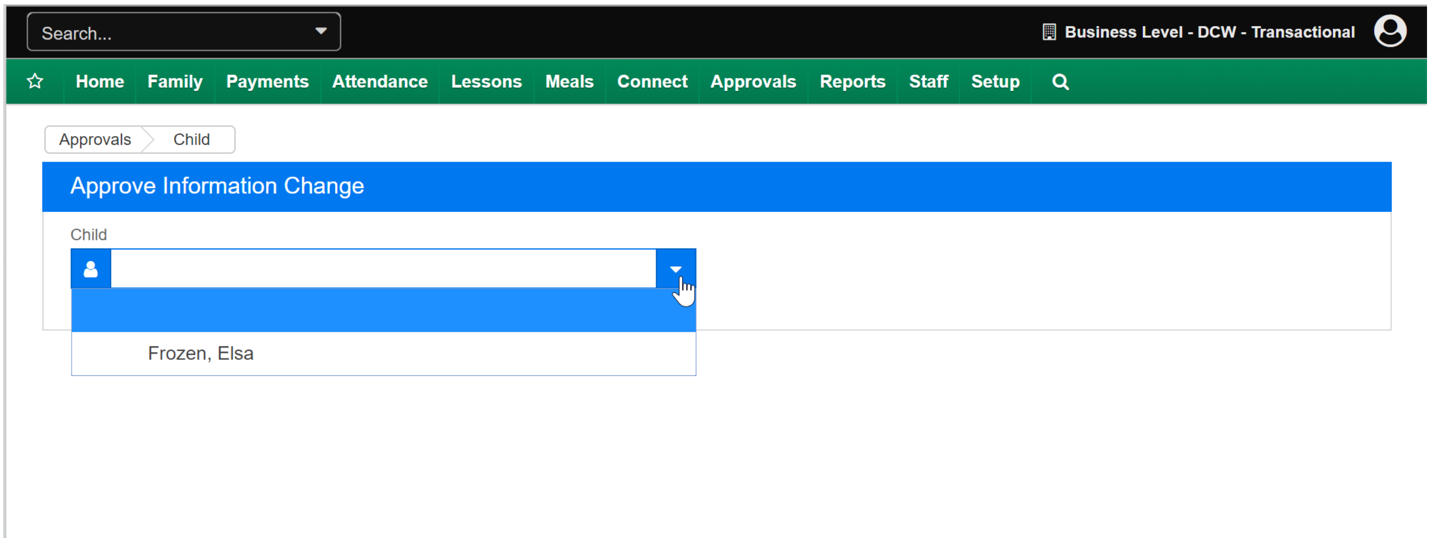
Through the Connect Portal, parents can update or add information for the child, including the child's home address, insurance, doctor, or hospital information. The administrator approval process is only required if No is selected in the Auto Approval Child Requests section in the Family tab of the Config section . This section requires the center to be setup for the Connect Parent Portal.

From the Home page, select the Changes tile or from the Approvals menu select Child.

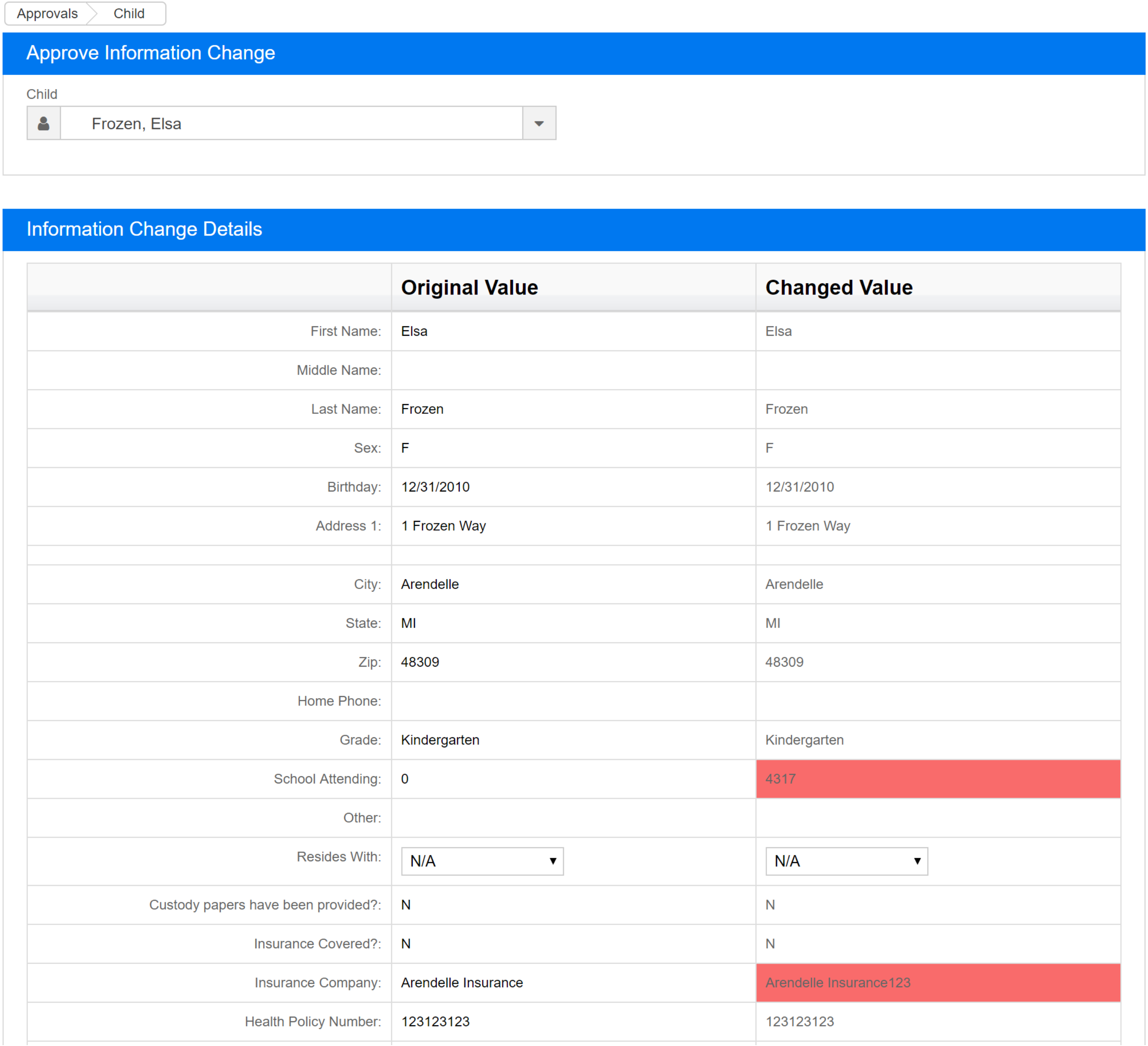


Center		Classroom	M	T	W	Th	F
DCW Transactional- Center 1		AM, Before School Care	4	3	4	3	4

On the Approvals > Child page, a child can be selected from the drop down box. If no children display in the drop down menu, this means there are no child changes to approve. The fields on this page are child-centric.



Verify the information that was changed for the child. The Change column displays the new information for the child, any updates or changes will display in red.



Approvals › Child

Approve Information Change

Child

Frozen, Elsa

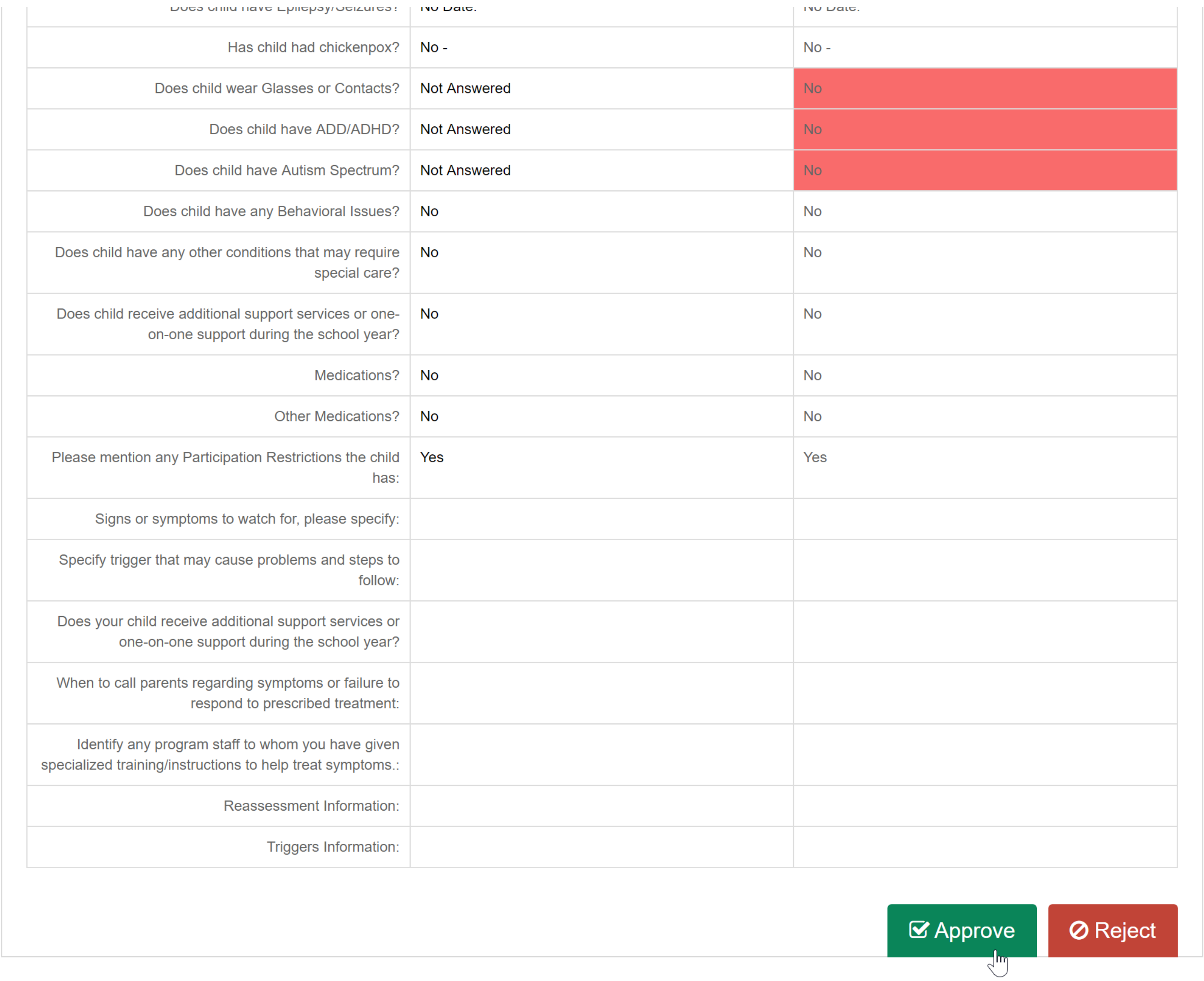
Information Change Details

	Original Value	Changed Value
First Name:	Elsa	Elsa
Middle Name:		
Last Name:	Frozen	Frozen
Sex:	F	F
Birthday:	12/31/2010	12/31/2010
Address 1:	1 Frozen Way	1 Frozen Way
City:	Arendelle	Arendelle
State:	MI	MI
Zip:	48309	48309
Home Phone:		
Grade:	Kindergarten	Kindergarten
School Attending:	0	4317
Other:		
Resides With:	N/A ▾	N/A ▾
Custody papers have been provided?:	N	N
Insurance Covered?:	N	N
Insurance Company:	Arendelle Insurance	Arendelle Insurance123
Health Policy Number:	123123123	123123123

When finished verifying the child's information, click on the Approve button to accept the changes.

To reject the changes for a child, click on the Reject button.

After clicking on the Approve or Reject button, the screen will refresh, indicating a successful save.



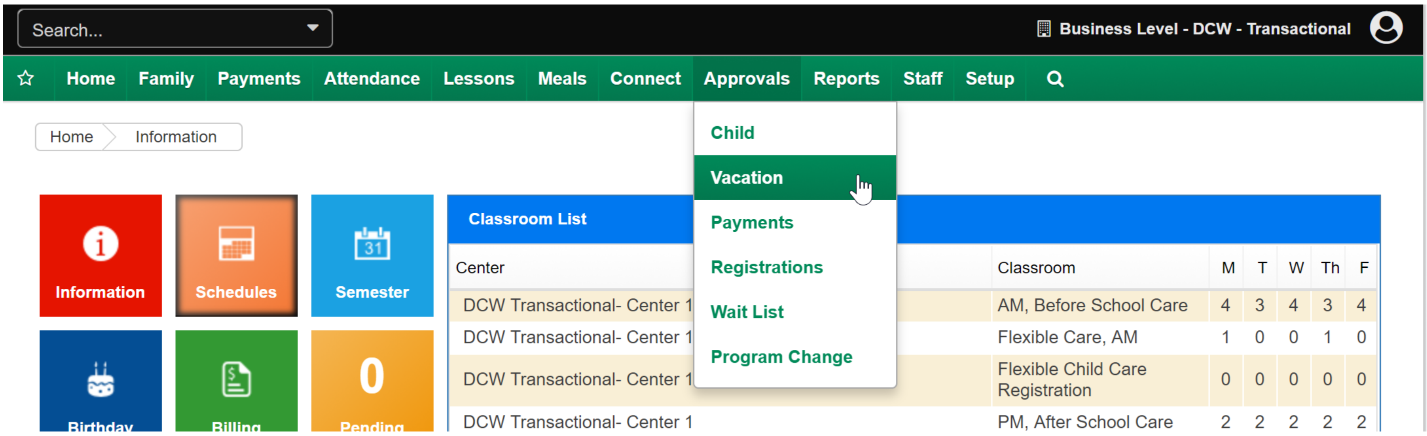
Does child have Epilepsy/Seizures?	No Date.	No Date.
Has child had chickenpox?	No -	No -
Does child wear Glasses or Contacts?	Not Answered	No
Does child have ADD/ADHD?	Not Answered	No
Does child have Autism Spectrum?	Not Answered	No
Does child have any Behavioral Issues?	No	No
Does child have any other conditions that may require special care?	No	No
Does child receive additional support services or one-on-one support during the school year?	No	No
Medications?	No	No
Other Medications?	No	No
Please mention any Participation Restrictions the child has:	Yes	Yes
Signs or symptoms to watch for, please specify:		
Specify trigger that may cause problems and steps to follow:		
Does your child receive additional support services or one-on-one support during the school year?		
When to call parents regarding symptoms or failure to respond to prescribed treatment:		
Identify any program staff to whom you have given specialized training/instructions to help treat symptoms.:		
Reassessment Information:		
Triggers Information:		

Approvals > Vacation

Last Modified on 10/16/2017 10:15 am EDT

Administrators can approve or reject vacation requests submitted by parents through the Connect Portal.

Click on the Approvals tab on the main toolbar, then select Vacation.

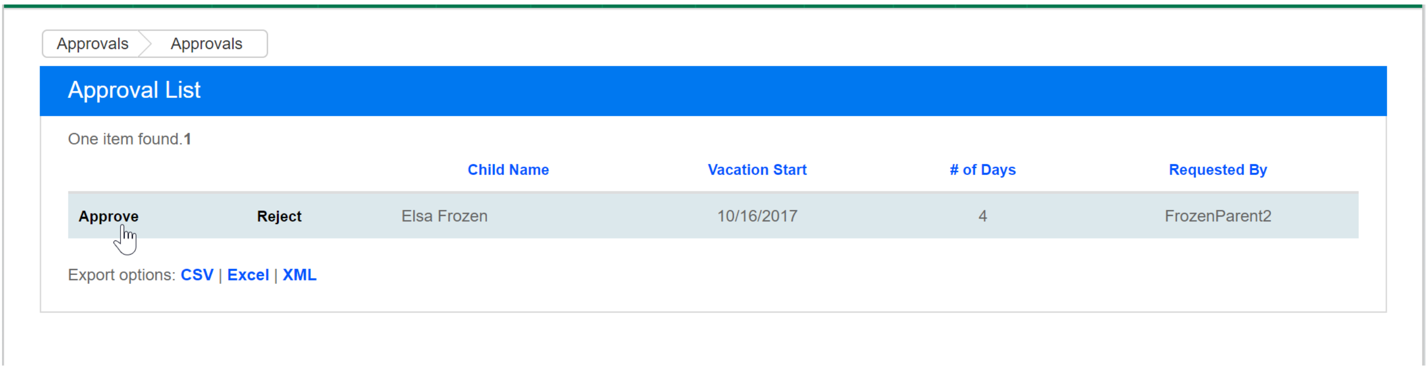


Center	Classroom	M	T	W	Th	F
DCW Transactional- Center 1	AM, Before School Care	4	3	4	3	4
DCW Transactional- Center 1	Flexible Care, AM	1	0	0	1	0
DCW Transactional- Center 1	Flexible Child Care Registration	0	0	0	0	0
DCW Transactional- Center 1	PM, After School Care	2	2	2	2	2

Click on the Approve link for the child to approve the vacation request. Vacation requests may be for multiple days, based on the number in the # of Days column.

To reject the vacation request, click on the Reject link.

The approval list will display the child's name, vacation start date, number of days requested and who the vacation was requested by.



One item found.1

		Child Name	Vacation Start	# of Days	Requested By
Approve	Reject	Elsa Frozen	10/16/2017	4	FrozenParent2

Export options: CSV | Excel | XML

After clicking on the Approve link, the screen will refresh, indicating a successful approval or rejection.

Note: Administrators can pull a report as a CSV, Excel or XML file.

Approvals > Registrations

Last Modified on 12/21/2018 3:24 pm EST

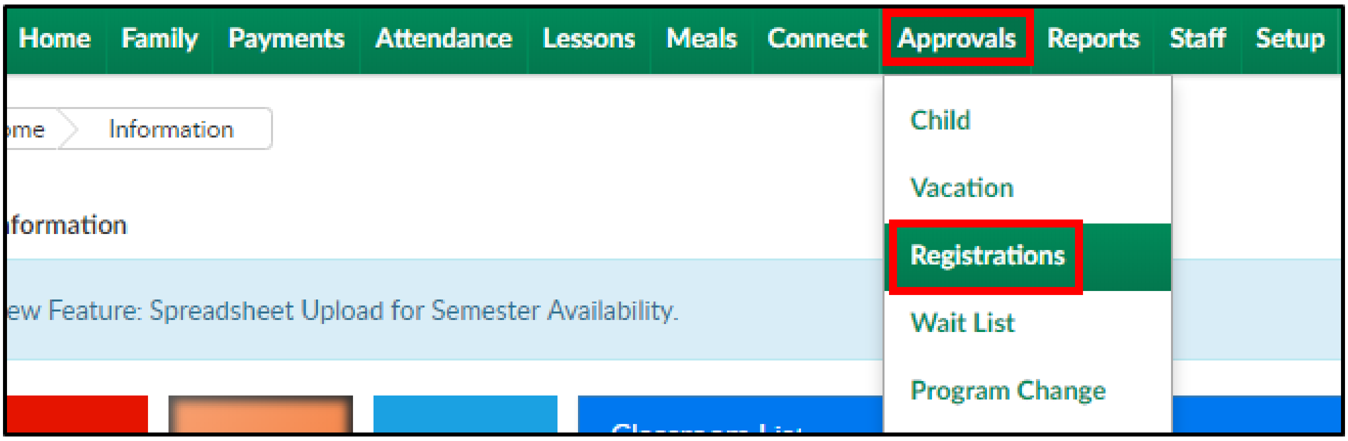
Once a new family registers via the registration page, their registrations are placed in a Pending status and will display on the Approvals > Registrations screen.

The Actions drop-down menu has the following options:

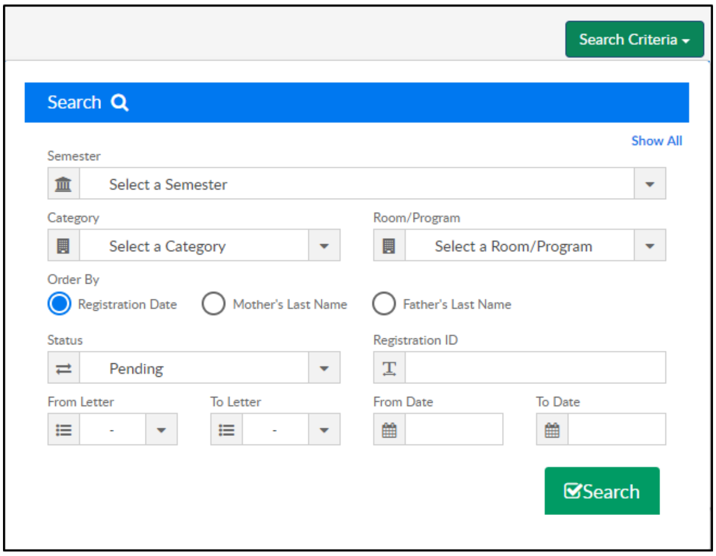
- Registration Report - this Excel report includes a count of completed and pending registrations filtered by category, then center, then room
- Registration Payment Report - this report opens in Excel and includes registration #, date, name, address, course, program, site, payment type, amount, transaction #, and payer name
- View SIS

There are many available options from this screen, please follow the instructions below:

1. Click Approvals from the menu bar and select Registrations



2. Click the Search Criteria button to display search options. There are several ways to search:



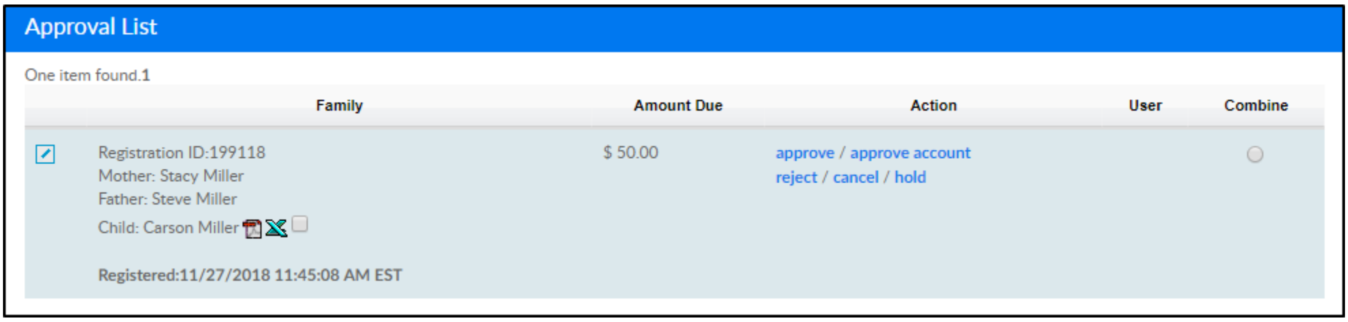
Order By ● Registration Date ○ Mother's Last Name ○ Father's Last Name

Status: Pending

From Letter: -
To Letter: -

- Semester - use the drop-down to view a specific semester's registrations
- Category - choose a category from the drop-down to view student registration from a specific category
- Room/Program - to only view a specific room, use the Room/Program drop-down to select the center/room
- Order By - select how the registrations will be sorted: Registration Date, Mother's Last Name, or Father's Last Name
- Status - view only registrations in a specific status. For example, select Pending to view only pending registrations
- Registration ID - to view only a specific registration, enter the Registration ID
- From/To Letter - to filter the results by a letter or group of letters, use the From/To Letter drop-down. For example, only view registrations from students with the last name from A-G
- From/To Date - filter the results by a specific date range

3. Click Search
4. The filtered results will appear

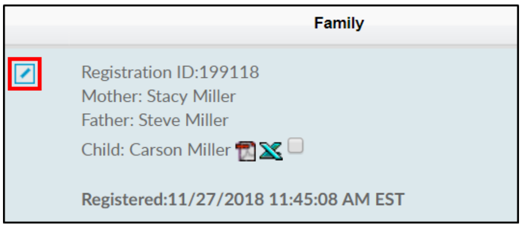

Approval List

One item found.1

	Family	Amount Due	Action	User	Combine
☑	Registration ID:199118 Mother: Stacy Miller Father: Steve Miller Child: Carson Miller ☐ **Registered:11/27/2018 11:45:08 AM EST**	$ 50.00	approve / approve account reject / cancel / hold		○

5. The Family column includes the following information:

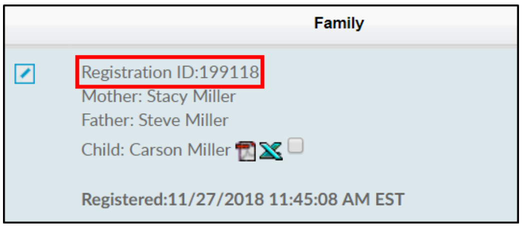
- Click the Edit icon to view the registration information such as amount due, payment information, parent/guardian information, student(s), and contacts. Information can be edited from this screen and the family can be Approved or Rejected



Registration ID:199118
Mother: Stacy Miller
Father: Steve Miller
Child: Carson Miller ☐

Registered:11/27/2018 11:45:08 AM EST

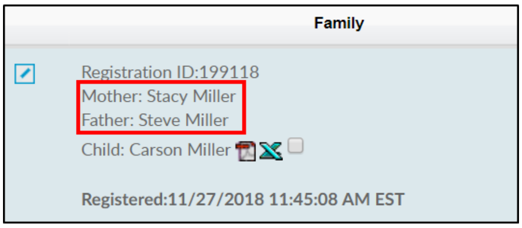
- Registration ID - a registration ID is created for each family that registers



Registration ID:199118
Mother: Stacy Miller
Father: Steve Miller
Child: Carson Miller ☐

Registered:11/27/2018 11:45:08 AM EST

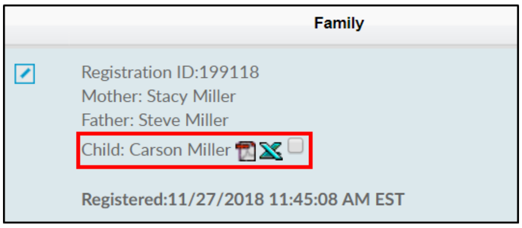
- Guardian 1/Guardian 2 (Mother/Father's) names.



Registration ID:199118
Mother: Stacy Miller
Father: Steve Miller
Child: Carson Miller ☐

Registered:11/27/2018 11:45:08 AM EST

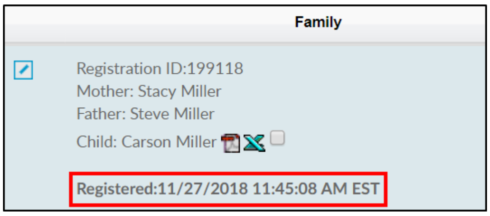
- Student(s) name



Registration ID:199118
Mother: Stacy Miller
Father: Steve Miller
Child: Carson Miller ☐

Registered:11/27/2018 11:45:08 AM EST

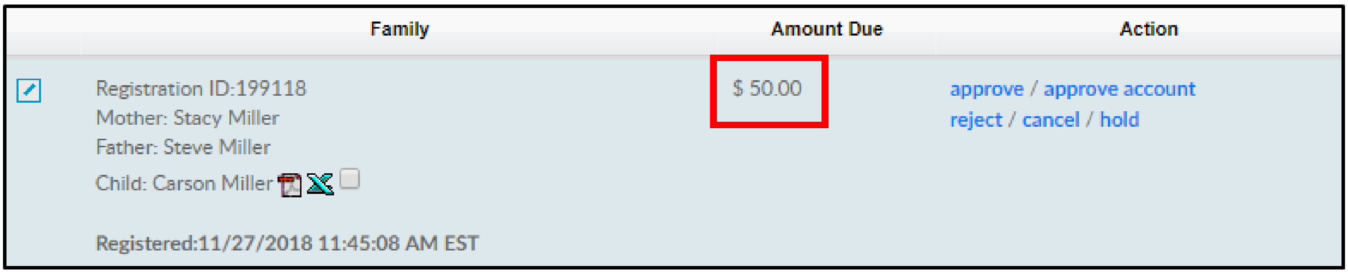
  - Click the PDF icon to view/print the Information Card for the student
  - Click the Excel icon to view/print the Registration Form for the student
  - Registered date and time



Registration ID:199118
Mother: Stacy Miller
Father: Steve Miller
Child: Carson Miller ☐

Registered:11/27/2018 11:45:08 AM EST

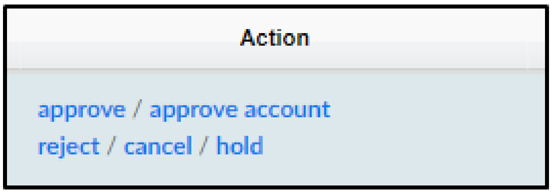
6. Amount Due is the current amount due from the family



	Family	Amount Due	Action
☑	Registration ID:199118 Mother: Stacy Miller Father: Steve Miller Child: Carson Miller ☐ **Registered:11/27/2018 11:45:08 AM EST**	$ 50.00	approve / approve account reject / cancel / hold

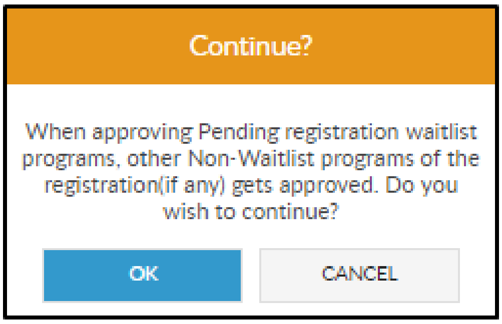
- This will be $0.00 if the family paid for the registration online
- There will be an amount in this column if the family used a Check Unlock Code

7. The following options are available from the Action column:



Action
approve / approve account reject / cancel / hold

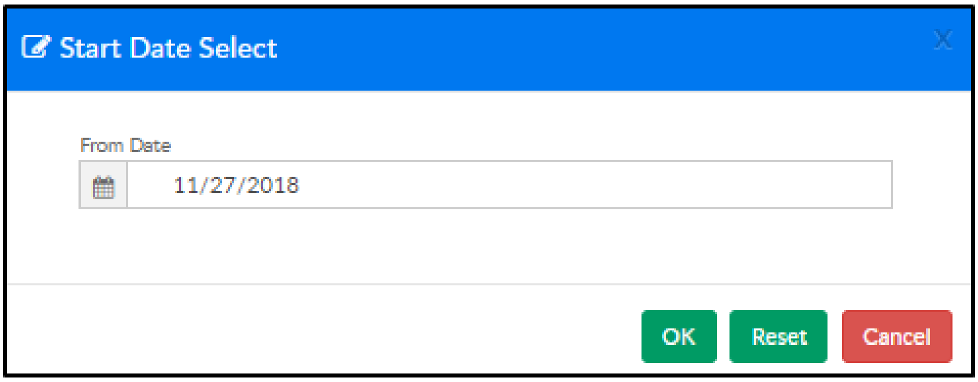
- Approve - Approves/creates the family account <u>and</u> enrolls the student(s) into the registered room/program
  - Upon clicking Approve, the following confirmation popup will appear. This popup confirms all program registration for this family will be approved



Continue?

When approving Pending registration waitlist programs, other Non-Waitlist programs of the registration(if any) gets approved. Do you wish to continue?

  - Confirm or enter a Start Date, then select OK. Please Note: the date cannot be changed if room is an Event. Cancel will close out of the popup and <u>not</u> approve the pending registration

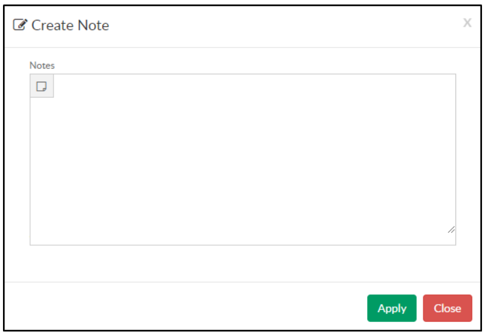


Start Date Select

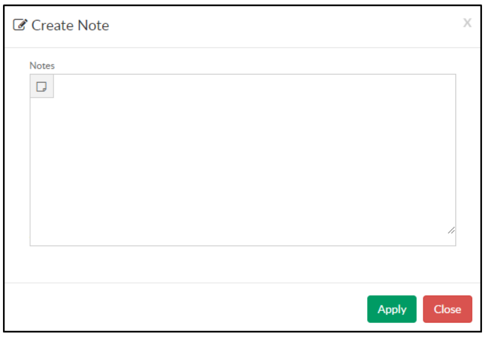
From Date: 11/27/2018

- Approve Account - Creates the family account. All room assignments are moved to Approvals > Wait List to individually approve each student

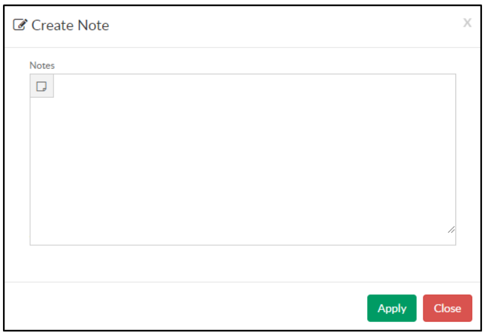
- **Reject - reject the family account <u>and</u> reject the room/program registration for the student(s).** When clicking Reject, a Create Note popup will appear. Enter any notes and click Apply



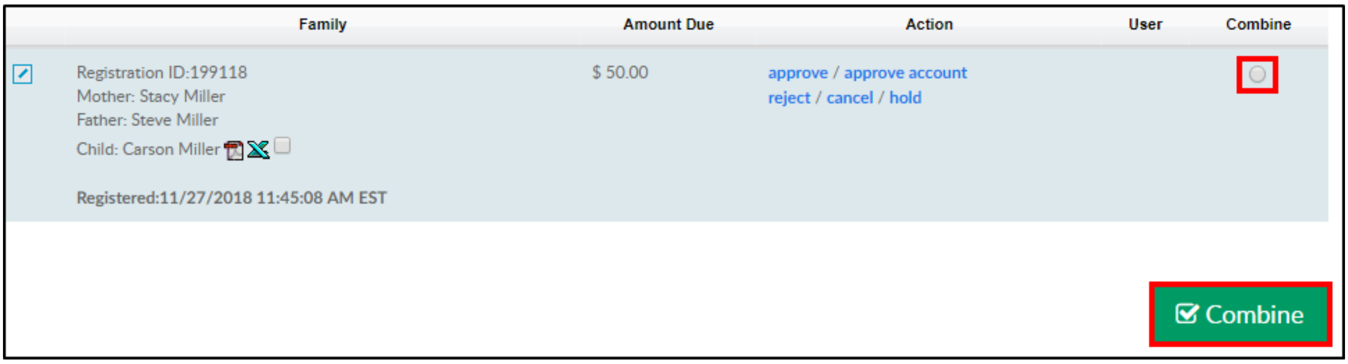
- Cancel - cancel the family account <u>and</u> cancel the room/program registration for the student(s). When clicking Cancel, a Create Note popup will appear. Enter any notes and click Apply



- Hold - place the family's account and the room/program registration on hold. This will not create the family's account or enroll the student(s). When clicking Hold, a Create Note popup will appear. Enter any notes and click Apply



8. Combine - if there are duplicate registrations for families in the Approval List, select each of the families by clicking the radio button under the Combine column. Then select the Combine button below the list



	Family	Amount Due	Action	User	Combine
	Registration ID:199118 Mother: Stacy Miller Father: Steve Miller Child: Carson Miller ☐ **Registered:11/27/2018 11:45:08 AM EST**	$ 50.00	approve / approve account reject / cancel / hold		○

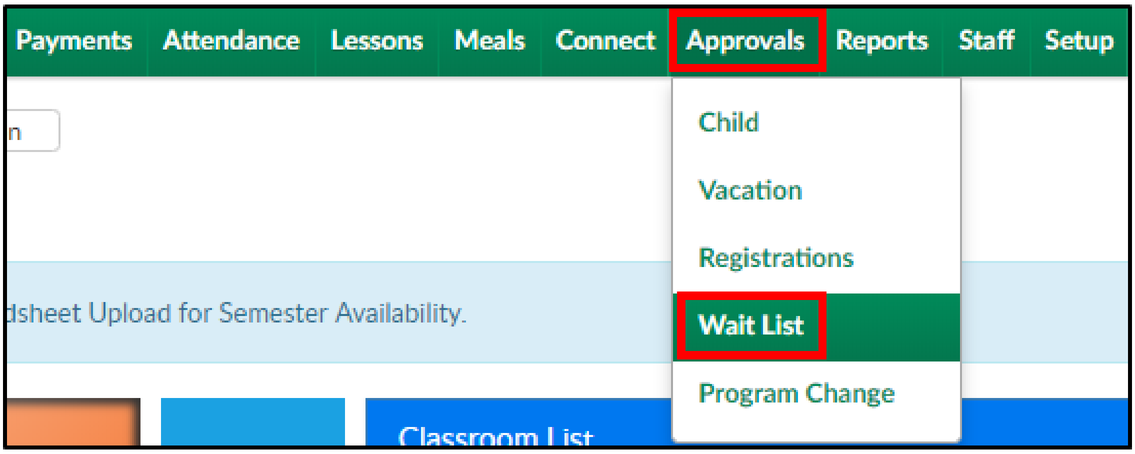
Approvals > Wait List

Last Modified on 11/27/2018 1:43 pm EST

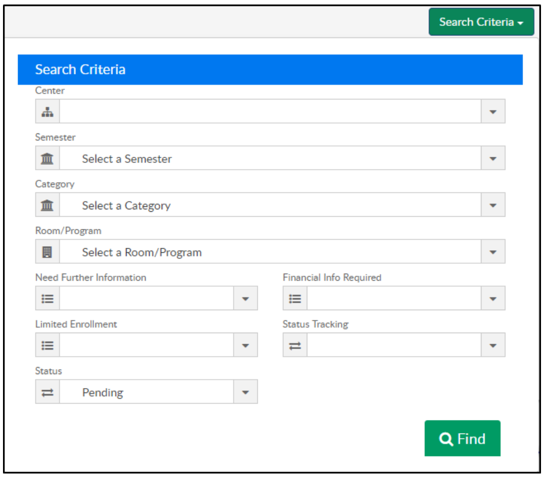
Wait Lists can be used to approve existing and new student registrations, as well as program requests once a room is full. The Program Wait List can be exported to Excel by clicking Actions, then select Export to Excel.

To access the Wait List, follow the instructions below:

1. Click Approvals from the menu bar, then select Wait List



2. Use the Search Criteria drop-down to filter results. The Program Wait List will automatically list all pending requests

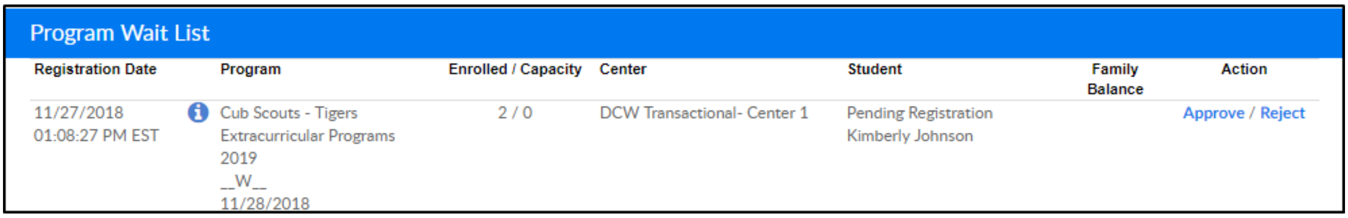


Status: Pending

   - Center - select from the drop-down to view wait list registrations for a specific center
   - Semester - select from the drop-down to view wait list registrations for a specific semester
   - Category - select from the drop-down to view wait list registrations for a specific category

- Room/Program - select from the drop-down to view wait list registrations for a specific room/program
- Need Further Information
- Financial Info Required
- Limited Enrollment
- Status Tracking
- Status - choose a status from the drop-down; Pending, Approved, or Rejected

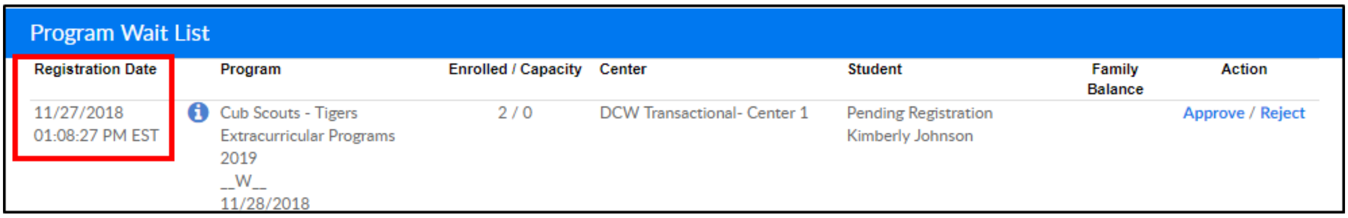
3. Click Find to populate the search results



Program Wait List

Registration Date	Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

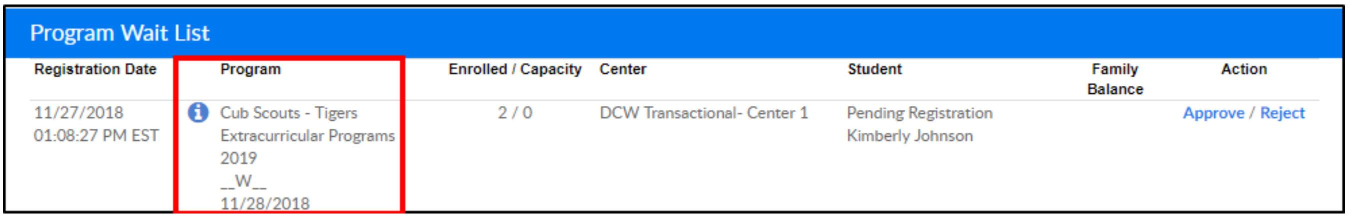
4. Registration Date column - the date and time the registration was completed



Program Wait List

Registration Date	Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

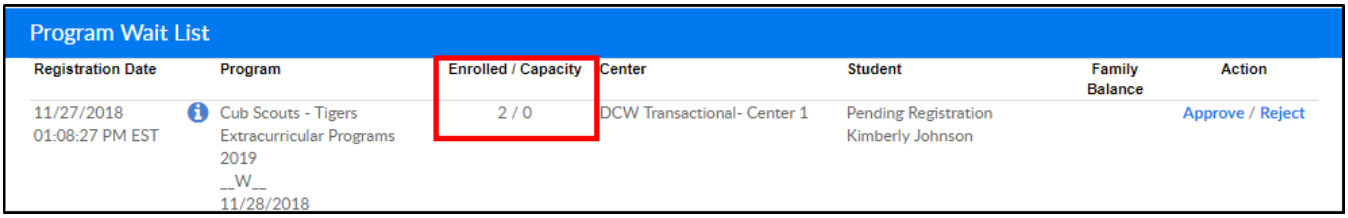
5. Program column - this column includes the program name, semester, selected day(s), and start date



Program Wait List

Registration Date	Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

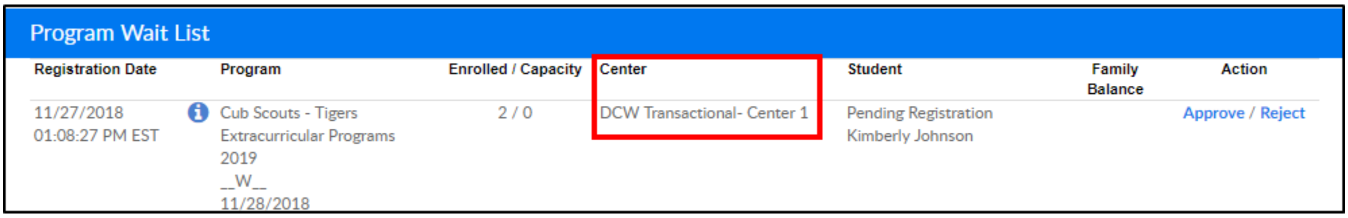
6. Enrolled/Capacity - the first number is the current number of students enrolled in the program. The second number is the program capacity. **Please Note**: if the capacity is unlimited, it will show zero under capacity



Program Wait List

Registration Date	Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

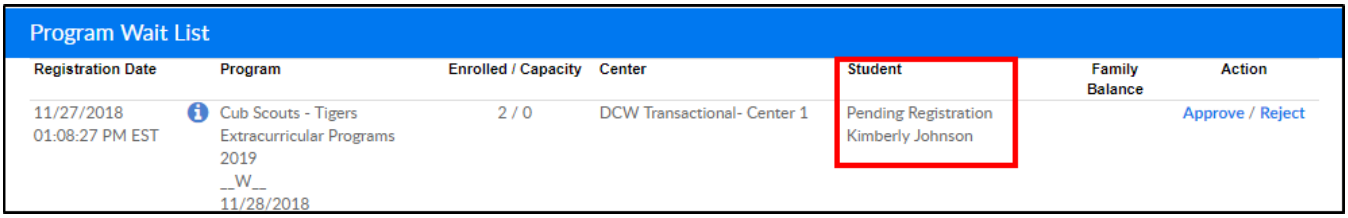
7. Center - this will show the center that was selected during registration



Program Wait List

Registration Date		Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	ℹ	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

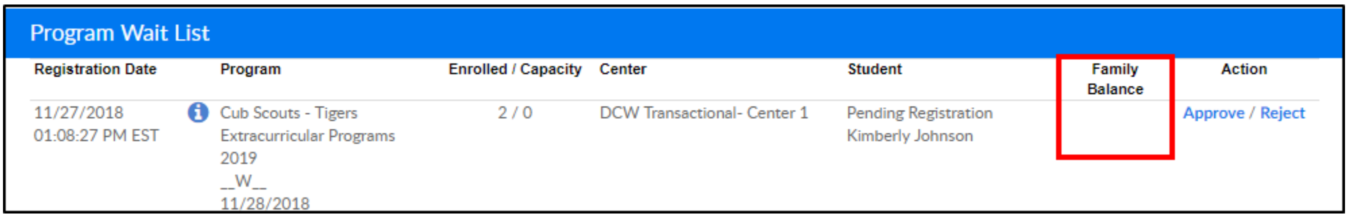
8. Student - the status and student's name will appear under this column



Program Wait List

Registration Date		Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	ℹ	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

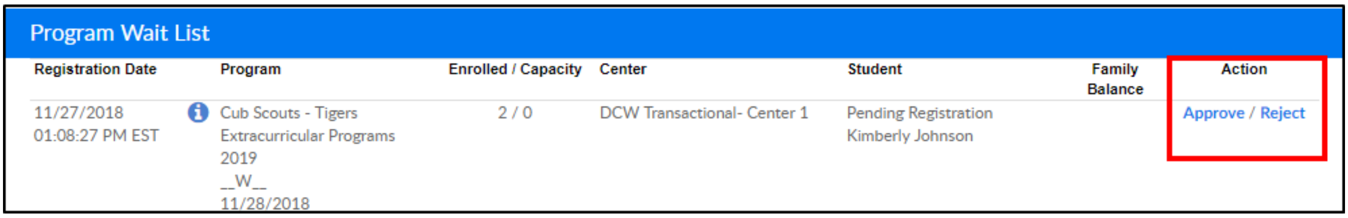
9. Family Balance - if the family has an outstanding balance, the amount will show in this column



Program Wait List

Registration Date		Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	ℹ	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

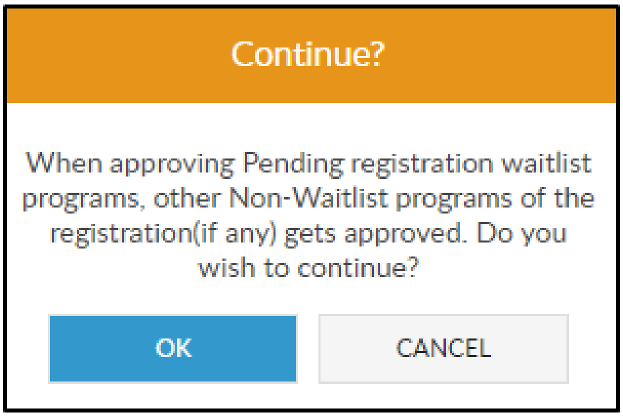
10. Action - this column allows the wait list registration to be Approved or Rejected



Program Wait List

Registration Date		Program	Enrolled / Capacity	Center	Student	Family Balance	Action
11/27/2018 01:08:27 PM EST	ℹ	Cub Scouts - Tigers Extracurricular Programs 2019 __W__ 11/28/2018	2 / 0	DCW Transactional- Center 1	Pending Registration Kimberly Johnson		Approve / Reject

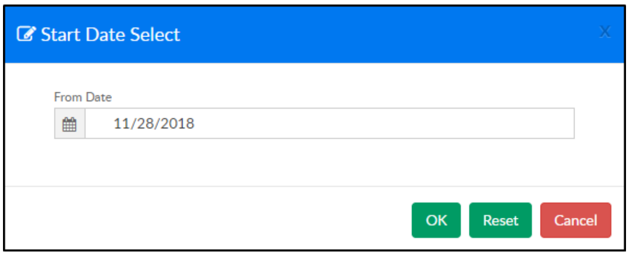
- Approve - this option creates the family account and approve the student's wait list entry and any non-wait list rooms, if any
    - After clicking Approve, the following confirmation message will appear. Click OK to continue or Cancel to stop the approval



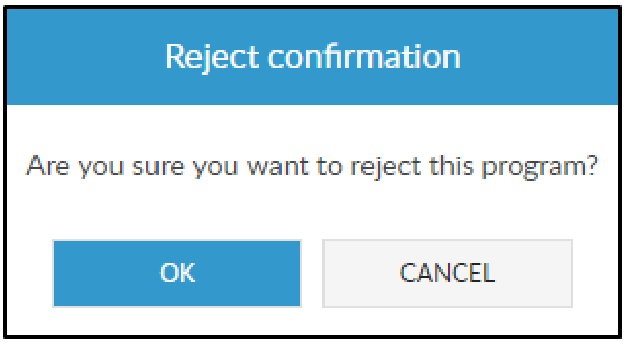
Continue?

When approving Pending registration waitlist programs, other Non-Waitlist programs of the registration(if any) gets approved. Do you wish to continue?

    - After clicking OK, select the start date from the next popup



- Reject - this option will only reject the selected wait list room. The family's account will stay in the Approval Registration screen. Once Reject is selected, the following confirmation window will appear. Click OK to confirm the rejection or click CANCEL to stop the rejection



Are you sure you want to reject this program?

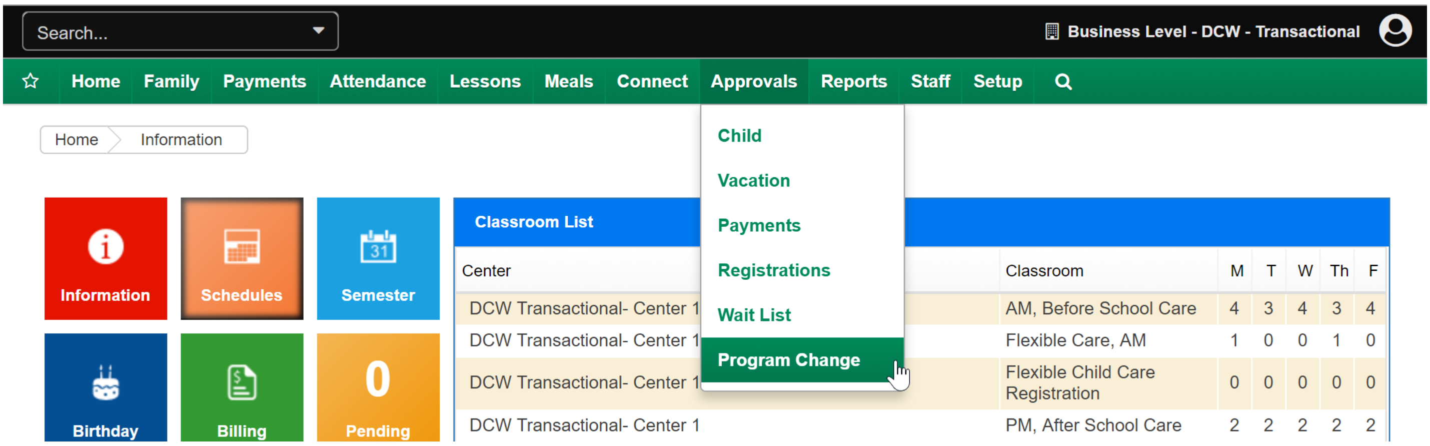
Approvals > Program Change

Last Modified on 03/14/2018 9:29 am EDT

Program changes allows users the ability to approve schedule change requests from families made through the Connect Parent Portal. Program changes allow families to select a new set of days for their currently scheduled children to attend.

Note: Program changes only apply to currently scheduled children (meaning the child has a room and rate on their program/room assignment page). Billing will not automatically adjust if a change is made mid-month and a site bills a flat fee up front.

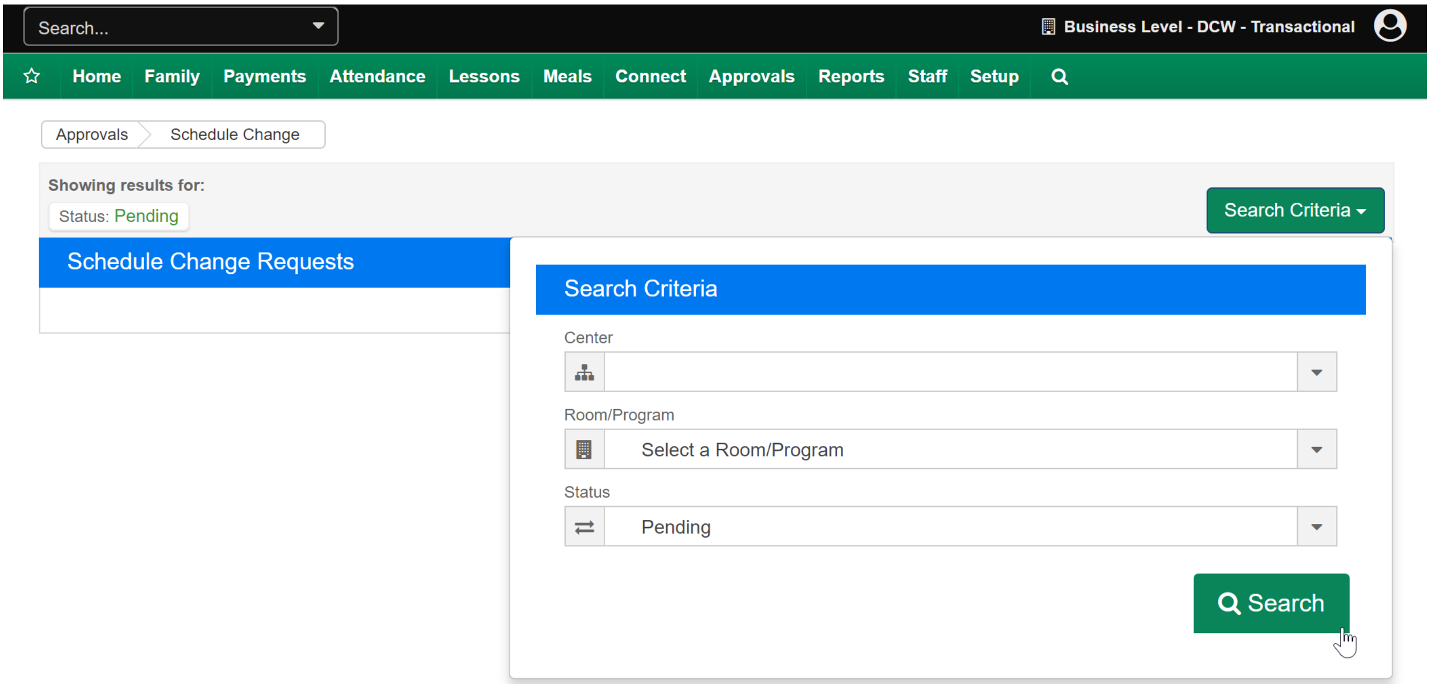
Select the Program Changes tile on the home > information page or select Program Changes from the Approvals drop down menu.



Center	Classroom	M	T	W	Th	F
DCW Transactional- Center 1	AM, Before School Care	4	3	4	3	4
DCW Transactional- Center 1	Flexible Care, AM	1	0	0	1	0
DCW Transactional- Center 1	Flexible Child Care Registration	0	0	0	0	0
DCW Transactional- Center 1	PM, After School Care	2	2	2	2	2

On the Program Change page select the Search Criteria button.

- Select a center if results should only display for a particular center, if left blank all pending changes will display (if at the business level).
- Select a specific Room/Program if results should display only a particular Room/Program's schedule change requests.
- Select a status to review.
    - Pending- not yet approved requests
    - Approved- requests that have been confirmed
    - Rejected- requests that have been denied.



Showing results for:
Status: Pending

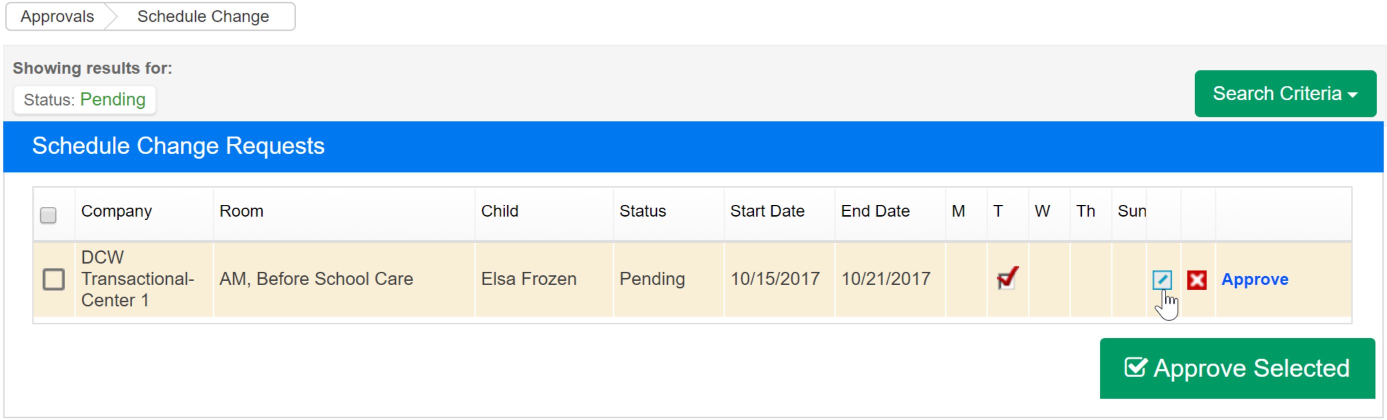
Center

Room/Program: Select a Room/Program

Status: Pending

The search results will display the center, room, child, request status, schedule start/end dates and updated schedule.

- To approve or reject requests individually select the blue approve link or the red x icon.
- To approve requests in batch format select the records you want to batch by selecting the square to the left of the center (do this for each line) then press the Approve Selected button.



Showing results for:
Status: Pending

☐	Company	Room	Child	Status	Start Date	End Date	M	T	W	Th	Sun			
☐	DCW Transactional-Center 1	AM, Before School Care	Elsa Frozen	Pending	10/15/2017	10/21/2017		✓				☑	☒	Approve

To review the request select the square green edit icon.

Reports to Get You Started

Last Modified on 01/04/2018 7:15 am EST

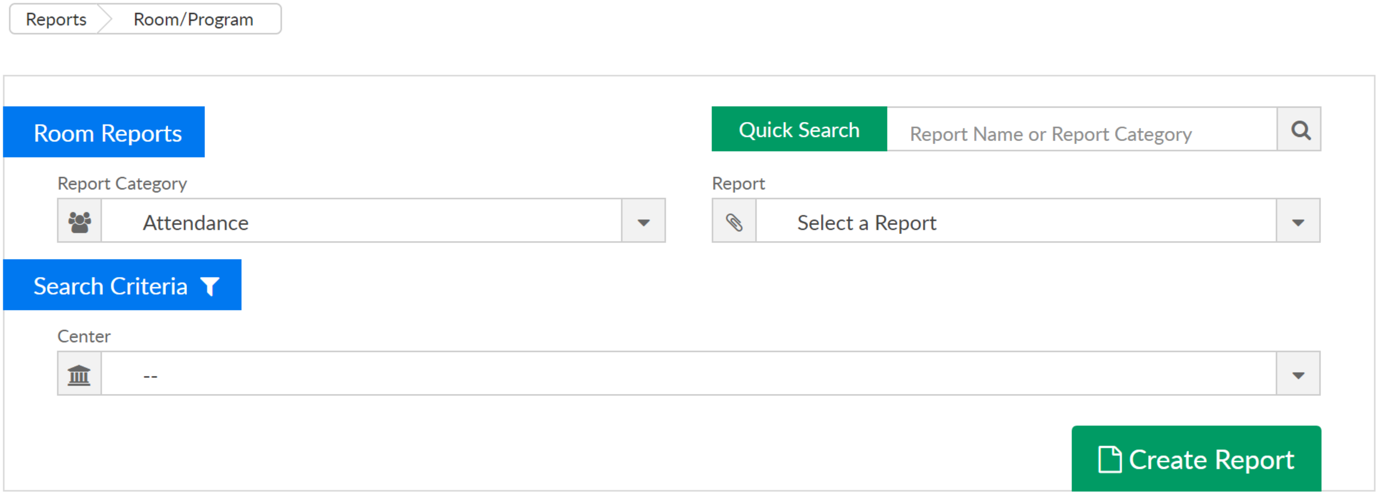
When first using the system the below reports will get you started.

Room/Program Reports will display child and family detail, attendance information, roster reporting, health information and staff detail.

To pull these reports select the Room menu option, then select Room/Program. On the Room/Program screen reports can be pulled by starting to type the report name in the Quick Search or Selecting a Report Category- then selecting a specific report. The Search Criteria will update based on the report that is selected.

In most cases reports can be pulled by the below detail- not all fields have to have a selection- the fields can be left blank to pull by a particular criteria:

- Center- Select a center or leave blank to pull detail for the business level
- Semester- Select a semester if data should be pulled by a particular time period
- Category- Select a category of programs to see the related data
- Room- Select a room to see program specific data
- Dates- Can be to/from date or as of date depending on the report



Report Category: Attendance

Report: Select a Report

Center: --

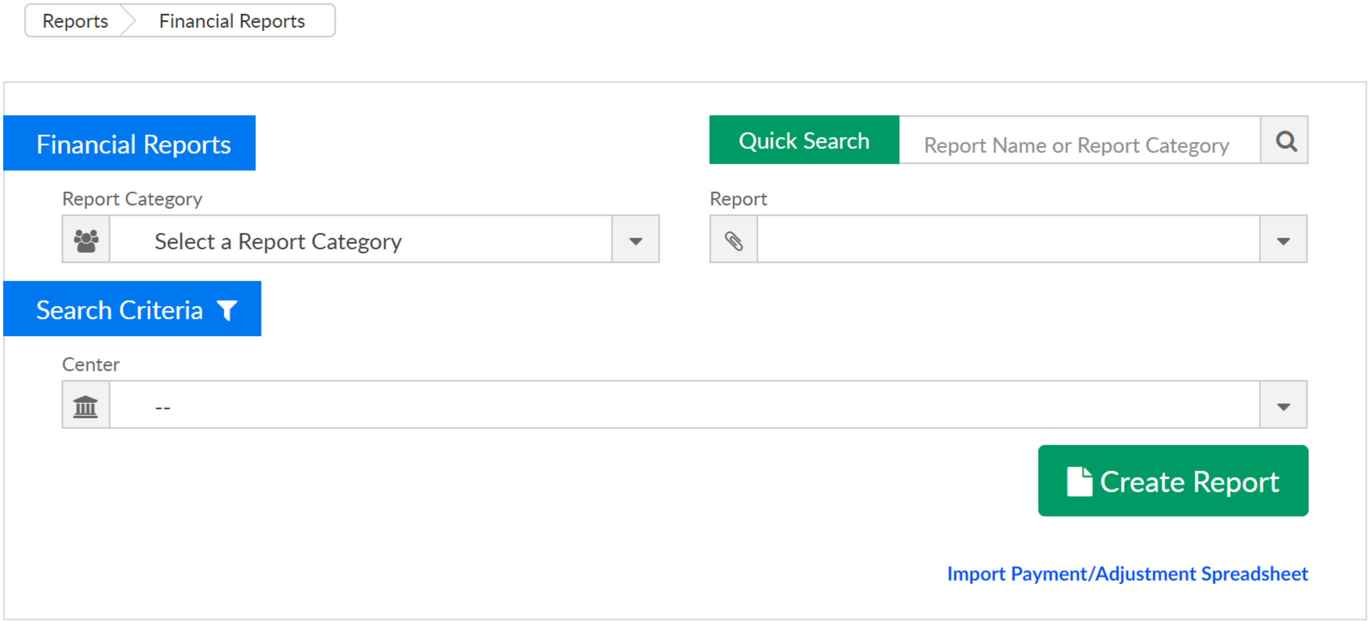
- Child Schedule Detail
    - Student Schedule Summary SSH- Excel - this report will display all students that are scheduled for a particular site, category or room on one tab. The report will display site/school, child name, birthday, start date, end date,

    program start date, program end date, category, room/program, days scheduled, rate, discount, SIS teacher, SIS number.
        - USE: this report can be used to verify child schedules have been setup correctly- room, semester, days, rate and discounts.
    - Student Schedule Summary- Excel - this report will display all students that are scheduled for a particular site, category or room on multiple tabs for separated by site. The report will display site/school, child name, birthday, start date, end date, program start date, program end date, category, room/program, days scheduled, rate, discount, SIS teacher, SIS number.
        - USE: this report can be used to verify child schedules have been setup correctly- room, semester, days, rate and discounts.
- Roster Reports
    - Weekly Schedule Roster- PDF- .Each room/program has their own sheet. Children display sorted by last name, with grade. Days not scheduled to attend are grayed out- there is a space for notes.
    - Weekly Roster Summary- PDF- A weekly summary of the number of children to attend a classroom for a week. The report is sorted by child last name, displays age- if the child is scheduled to attend the program name will display in the day the child will be expected.
- Sign-In Sheets
    - Weekly Sign In (Version 3)- Creates a sign in report that administrators can record if a child attended a classroom for a day and also has a time and signature text box for parents to record the time the child was checked into or out of the classroom. It also contains the date the child was born.
    - Weekly Sign In/Out Ontario- PDF- Report displays a check in and out spreadsheet for children in a center. It also displays the name of the teacher assigned to the classroom.

Financial Reports will display center financial information, this will include payment detail, revenue information and outstanding AR.

To pull these reports select the Report menu option, then select Financial. On the Financial screen reports can be pulled by starting to type the report name in the Quick

Search or Selecting a Report Category- then selecting a specific report. The Search Criteria will update based on the report that is selected.



- Revenue Reports
    - Charges and Credits by Center- PDF- This report will display a summary or revenue, credits and payments by program center.
    - Charges and Credits by Center Detail- Excel- This report will display child specific detail for revenue, credits and payments by program center.
    - General Ledger Posting- Excel- This report will display all financial activity that has been created. If the general ledger codes are setup and associated to valid values GL strings will display.
- Balance/Collection Reports (The software displays total balance owed split by parent/sponsor/third party agency-we do not display an outstanding balance report by allocation. This means that the balance that is open for parents should be treated as a lump sum that is due. It will be difficult to try and collect by program.)
    - Outstanding Balance by Program Center- A report that displays the outstanding balance for the families in the facility. This report can be sorted alphabetically or by family balance. Also can be filtered on balance less than or greater than filter amount.
    - Third Party Balance Report- Displays the outstanding balances for the

  children associated to a third party agency.
  - Accounts Receivable Report- Excel- A report that displays the outstanding amount owed from both the parents and third party agencies for a child.

Payment Reports will display under the payments tab. These reports deal with totaling payments that have been received by a center.

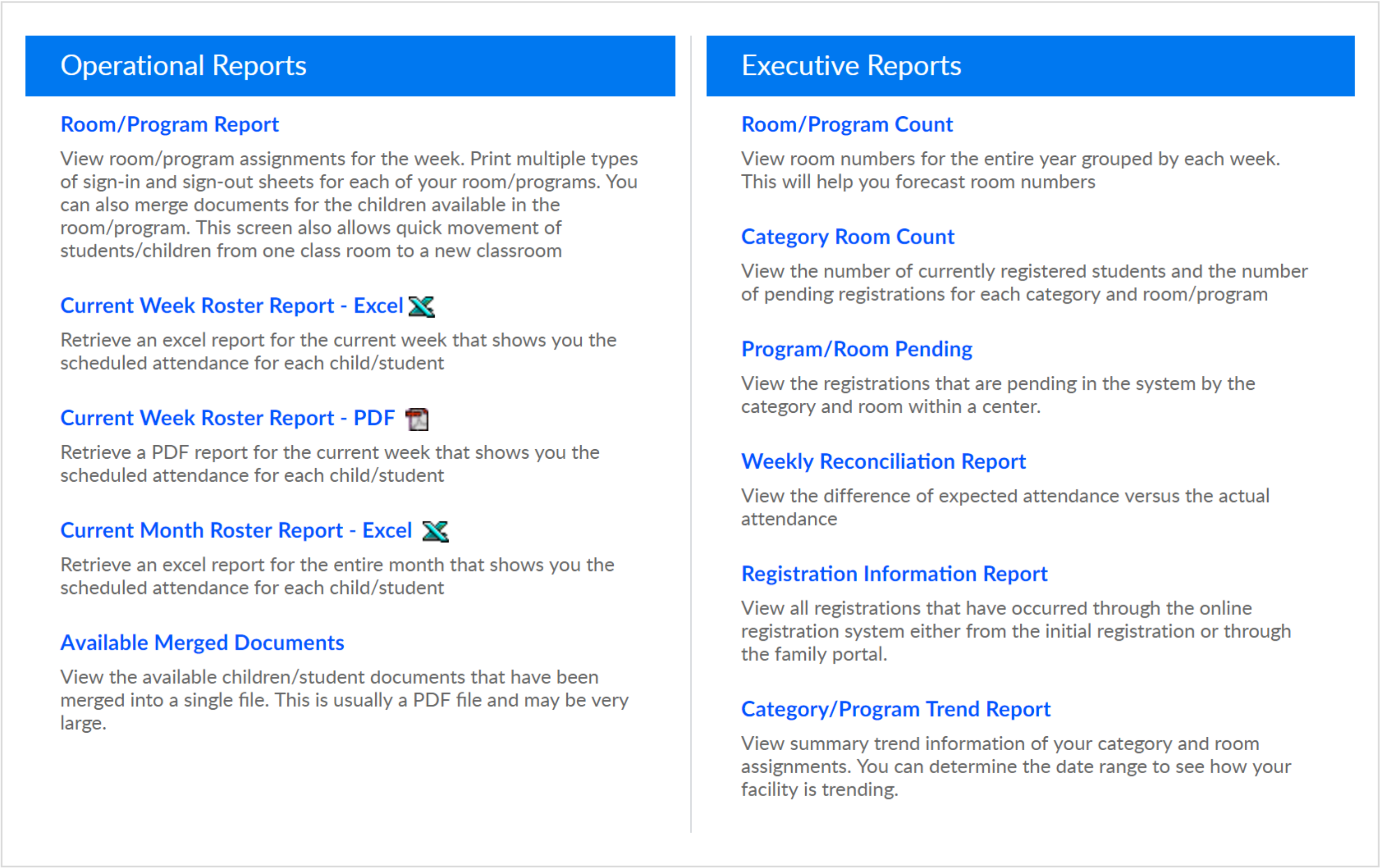
To pull these reports select the indicated option from the Payments menu.

- Payment Reports
  - Go to Payments > Payments/Adjustments - select the search criteria button and search for a date range- add additional filters as needed- then press Search. Once detail is displayed on the screen press the Actions menu and select either the Excel (CSV) or PDF option.
  - Go to Payments > Online/POS - enter search criteria, then select the Actions menu and choose the Export- Excel option. This report will show you online ACH/credit card payments that have been processed for a selected date range. This report will also display any transactions that failed to process at the time of entry.

Reports > Program

Last Modified on 12/27/2017 9:32 am EST

From the Reports menu, select the Program option.



Operational Reports

Room/Program Report

View room/program assignments for the week. Print multiple types of sign-in and sign-out sheets for each of your room/programs. You can also merge documents for the children available in the room/program. This screen also allows quick movement of students/children from one class room to a new classroom

Current Week Roster Report - Excel

Retrieve an excel report for the current week that shows you the scheduled attendance for each child/student

Current Week Roster Report - PDF

Retrieve a PDF report for the current week that shows you the scheduled attendance for each child/student

Current Month Roster Report - Excel

Retrieve an excel report for the entire month that shows you the scheduled attendance for each child/student

Available Merged Documents

View the available children/student documents that have been merged into a single file. This is usually a PDF file and may be very large.

Executive Reports

Room/Program Count

View room numbers for the entire year grouped by each week. This will help you forecast room numbers

Category Room Count

View the number of currently registered students and the number of pending registrations for each category and room/program

Program/Room Pending

View the registrations that are pending in the system by the category and room within a center.

Weekly Reconciliation Report

View the difference of expected attendance versus the actual attendance

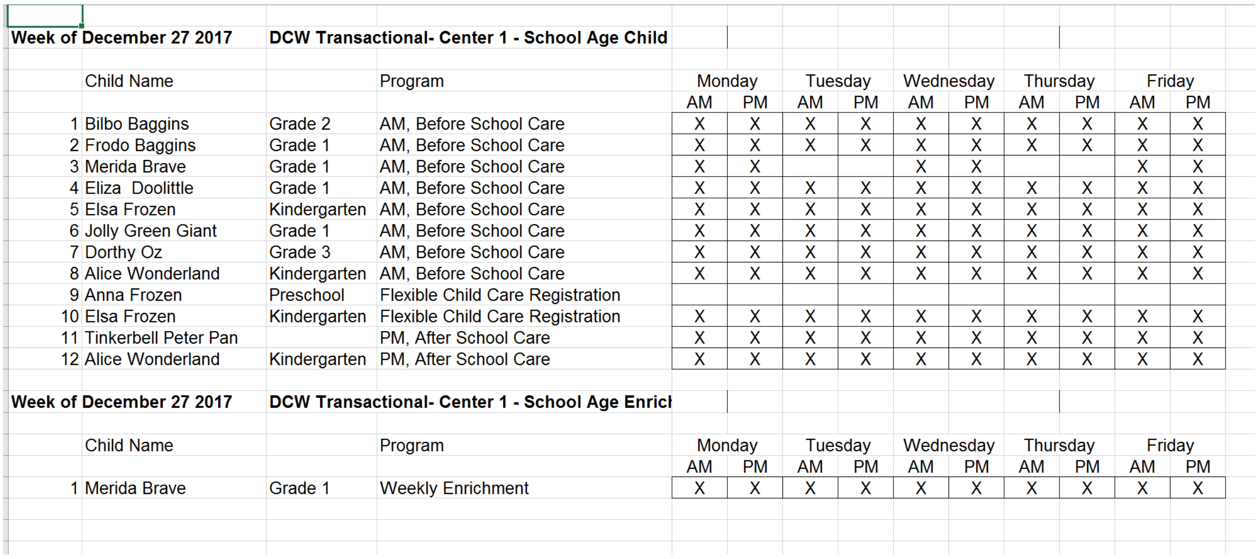
Registration Information Report

View all registrations that have occurred through the online registration system either from the initial registration or through the family portal.

Category/Program Trend Report

View summary trend information of your category and room assignments. You can determine the date range to see how your facility is trending.

- Operational Reports
    - Room/Program Report- this is a shortcut and will open the Reports > Room/Program screen so users are able to search for specific reports.
    - Current Week Roster Report- Excel- This report is useful if the AM/PM feature is set on the room or child schedules, this report will display child name, grade, program and day scheduled.



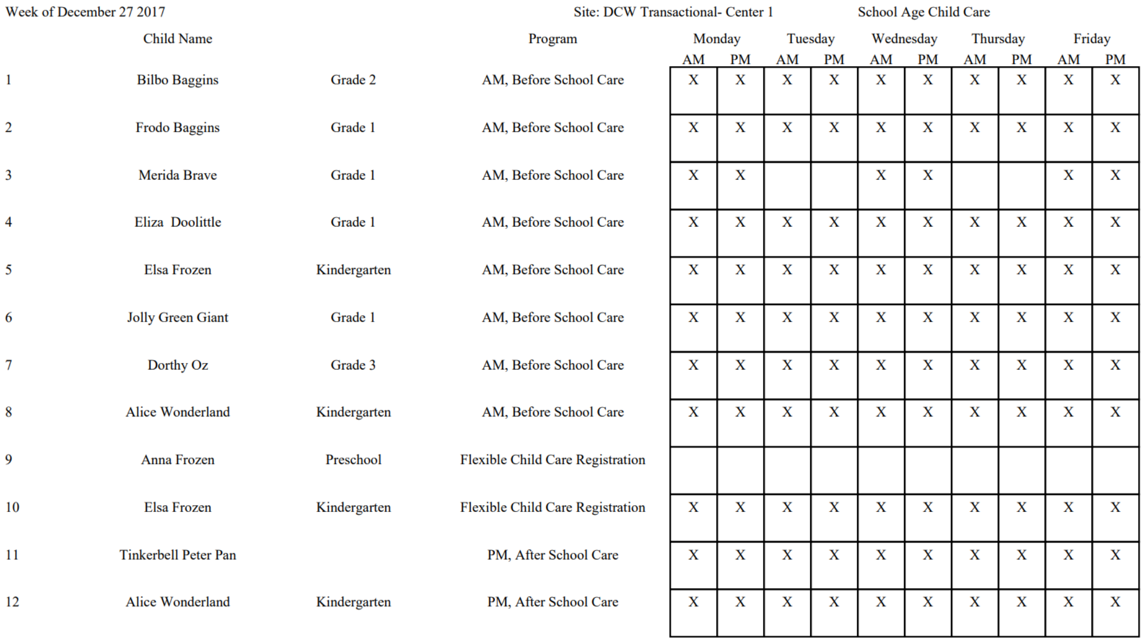
Week of December 27 2017 **DCW Transactional- Center 1 - School Age Child**

	Child Name		Program	Monday		Tuesday		Wednesday		Thursday		Friday	
				AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
1	Bilbo Baggins	Grade 2	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
2	Frodo Baggins	Grade 1	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
3	Merida Brave	Grade 1	AM, Before School Care	X	X			X	X			X	X
4	Eliza Doolittle	Grade 1	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
5	Elsa Frozen	Kindergarten	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
6	Jolly Green Giant	Grade 1	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
7	Dorthy Oz	Grade 3	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
8	Alice Wonderland	Kindergarten	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
9	Anna Frozen	Preschool	Flexible Child Care Registration										
10	Elsa Frozen	Kindergarten	Flexible Child Care Registration	X	X	X	X	X	X	X	X	X	X
11	Tinkerbell Peter Pan		PM, After School Care	X	X	X	X	X	X	X	X	X	X
12	Alice Wonderland	Kindergarten	PM, After School Care	X	X	X	X	X	X	X	X	X	X

Week of December 27 2017 **DCW Transactional- Center 1 - School Age Enricl**

	Child Name		Program	Monday		Tuesday		Wednesday		Thursday		Friday	
				AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
1	Merida Brave	Grade 1	Weekly Enrichment	X	X	X	X	X	X	X	X	X	X

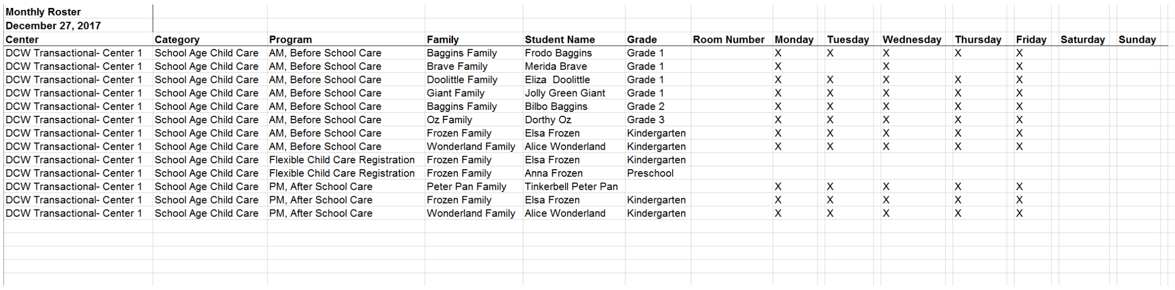
- Current Week Roster Report- PDF- This report is useful if the AM/PM feature is set on the room or child schedules, this report will display child name, grade, program and day scheduled.



Week of December 27 2017 Site: DCW Transactional- Center 1 School Age Child Care

	Child Name		Program	Monday		Tuesday		Wednesday		Thursday		Friday	
				AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
1	Bilbo Baggins	Grade 2	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
2	Frodo Baggins	Grade 1	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
3	Merida Brave	Grade 1	AM, Before School Care	X	X			X	X			X	X
4	Eliza Doolittle	Grade 1	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
5	Elsa Frozen	Kindergarten	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
6	Jolly Green Giant	Grade 1	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
7	Dorthy Oz	Grade 3	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
8	Alice Wonderland	Kindergarten	AM, Before School Care	X	X	X	X	X	X	X	X	X	X
9	Anna Frozen	Preschool	Flexible Child Care Registration										
10	Elsa Frozen	Kindergarten	Flexible Child Care Registration	X	X	X	X	X	X	X	X	X	X
11	Tinkerbell Peter Pan		PM, After School Care	X	X	X	X	X	X	X	X	X	X
12	Alice Wonderland	Kindergarten	PM, After School Care	X	X	X	X	X	X	X	X	X	X

- Current Month Roster Report- Excel- A roster that will display the scheduled children for a month at a time. This report will not display date ranges, but will display Center, Category, Program, Family, Student, Grade, Physical Room Number and scheduled days.

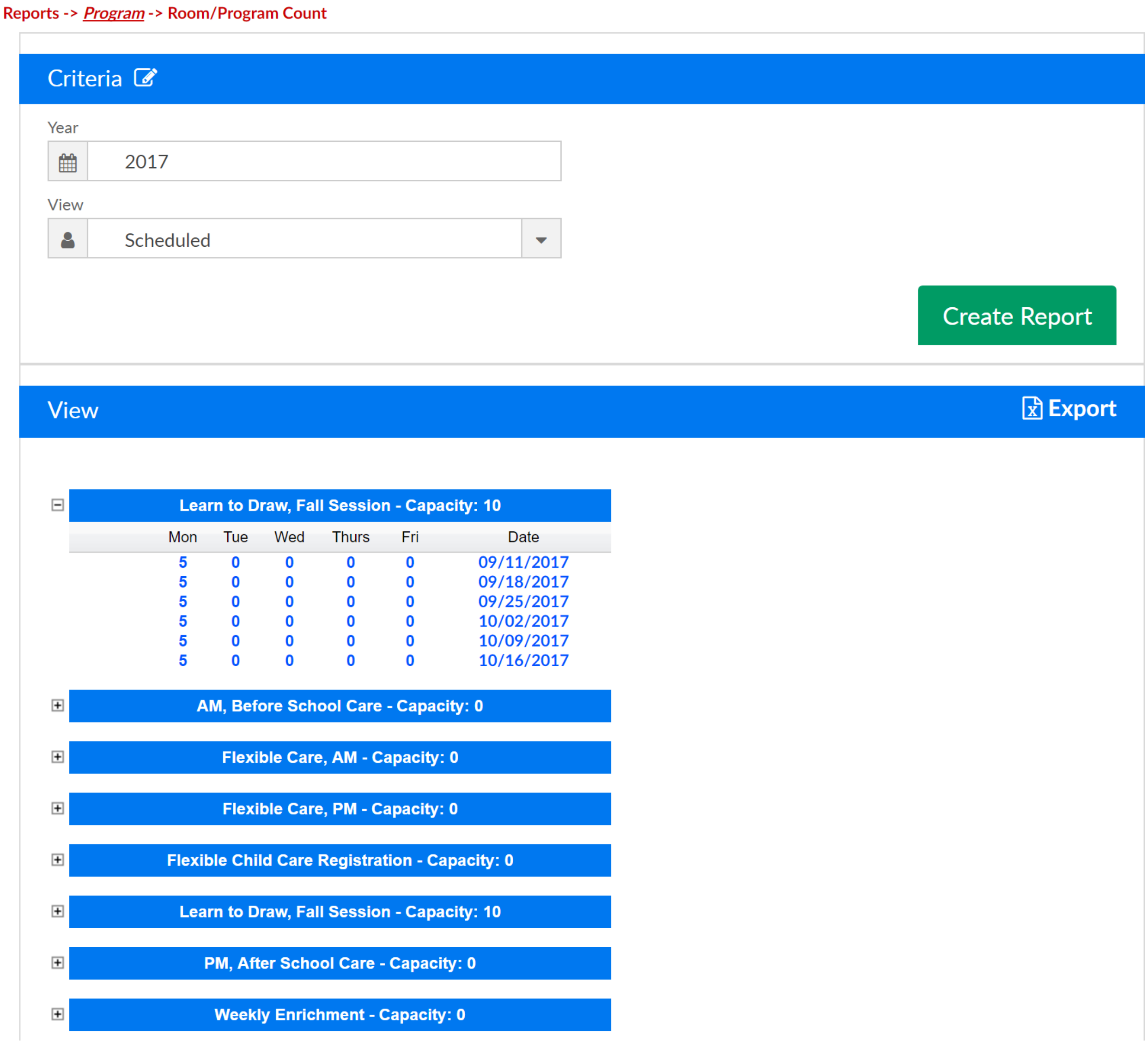


Monthly Roster
December 27, 2017

Center	Category	Program	Family	Student Name	Grade	Room Number	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Baggins Family	Frodo Baggins	Grade 1		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Brave Family	Merida Brave	Grade 1		X		X		X		
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Doolittle Family	Eliza Doolittle	Grade 1		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Giant Family	Jolly Green Giant	Grade 1		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Baggins Family	Bilbo Baggins	Grade 2		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Oz Family	Dorthy Oz	Grade 3		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Frozen Family	Elsa Frozen	Kindergarten		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	AM, Before School Care	Wonderland Family	Alice Wonderland	Kindergarten		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	Flexible Child Care Registration	Frozen Family	Elsa Frozen	Kindergarten								
DCW Transactional- Center 1	School Age Child Care	Flexible Child Care Registration	Frozen Family	Anna Frozen	Preschool								
DCW Transactional- Center 1	School Age Child Care	PM, After School Care	Peter Pan Family	Tinkerbell Peter Pan			X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	PM, After School Care	Frozen Family	Elsa Frozen	Kindergarten		X	X	X	X	X		
DCW Transactional- Center 1	School Age Child Care	PM, After School Care	Wonderland Family	Alice Wonderland	Kindergarten		X	X	X	X	X		

- Available Merged Documents- this will open a document that contains any student/child documents that have been merged together from the Online report option under General reports on the Reports > Room/Program screen.

- Executive Reports
  - Room/Program Count- This option will link out to the Room/Program Count screen, the export will open a Weekly Room Count Report. The view can be selected as Scheduled (acutal students/children) or Available (capacity)



Reports -> *Program* -> Room/Program Count

Criteria

Year: 2017

View: Scheduled

Learn to Draw, Fall Session - Capacity: 10

Mon	Tue	Wed	Thurs	Fri	Date
5	0	0	0	0	09/11/2017
5	0	0	0	0	09/18/2017
5	0	0	0	0	09/25/2017
5	0	0	0	0	10/02/2017
5	0	0	0	0	10/09/2017
5	0	0	0	0	10/16/2017

AM, Before School Care - Capacity: 0

Flexible Care, AM - Capacity: 0

Flexible Care, PM - Capacity: 0

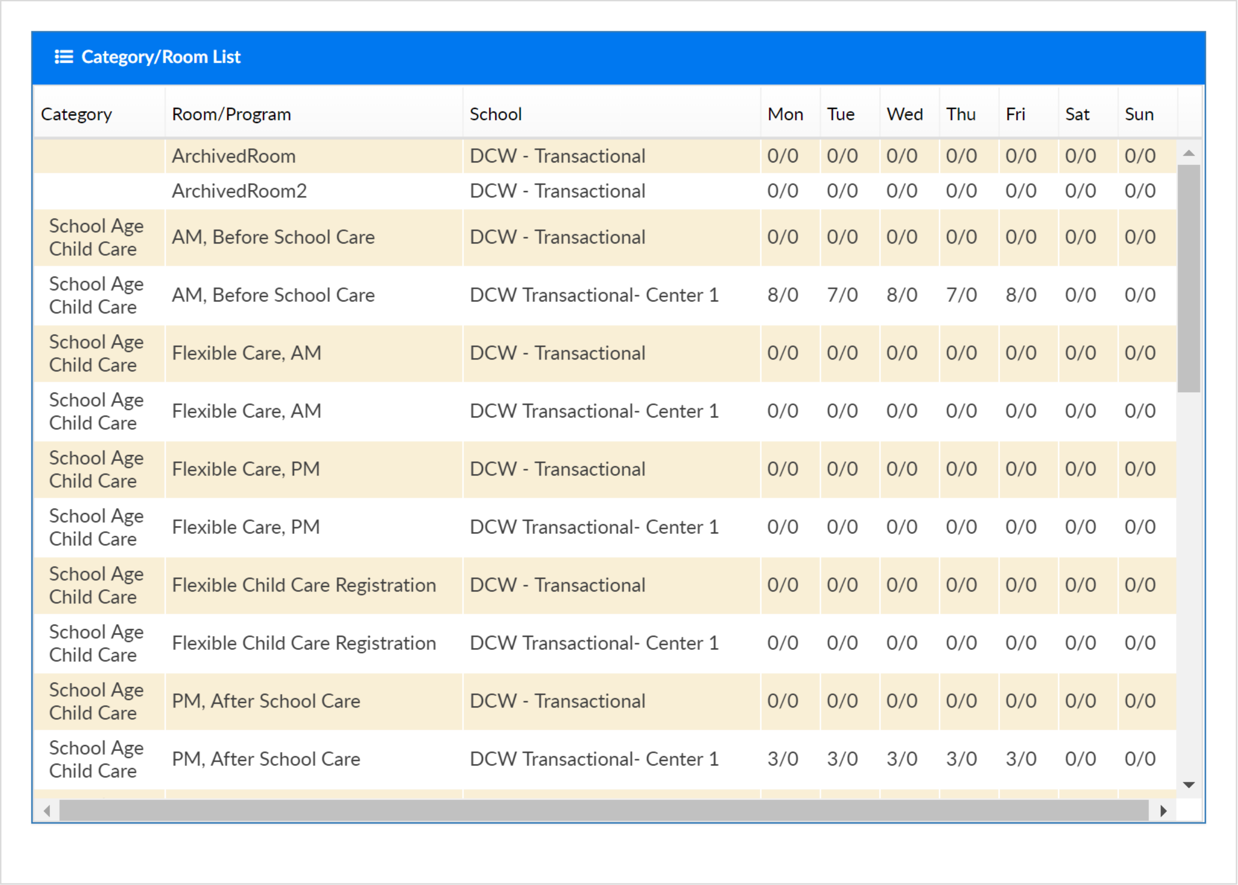
Flexible Child Care Registration - Capacity: 0

Learn to Draw, Fall Session - Capacity: 10

PM, After School Care - Capacity: 0

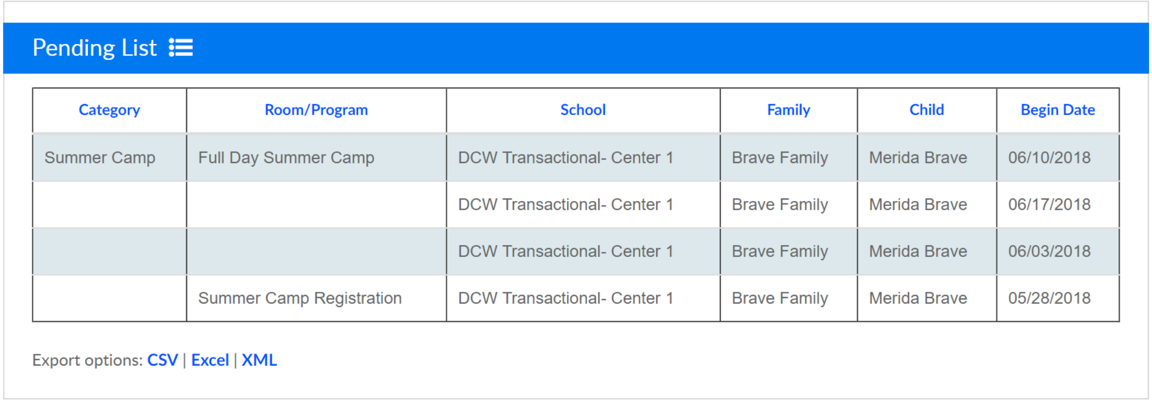
Weekly Enrichment - Capacity: 0

  - Category Program Count- view currently registered to pending students for each room by day


Category/Room List

Category	Room/Program	School	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	ArchivedRoom	DCW - Transactional	0/0	0/0	0/0	0/0	0/0	0/0	0/0
	ArchivedRoom2	DCW - Transactional	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	AM, Before School Care	DCW - Transactional	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	AM, Before School Care	DCW Transactional- Center 1	8/0	7/0	8/0	7/0	8/0	0/0	0/0
School Age Child Care	Flexible Care, AM	DCW - Transactional	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	Flexible Care, AM	DCW Transactional- Center 1	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	Flexible Care, PM	DCW - Transactional	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	Flexible Care, PM	DCW Transactional- Center 1	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	Flexible Child Care Registration	DCW - Transactional	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	Flexible Child Care Registration	DCW Transactional- Center 1	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	PM, After School Care	DCW - Transactional	0/0	0/0	0/0	0/0	0/0	0/0	0/0
School Age Child Care	PM, After School Care	DCW Transactional- Center 1	3/0	3/0	3/0	3/0	3/0	0/0	0/0

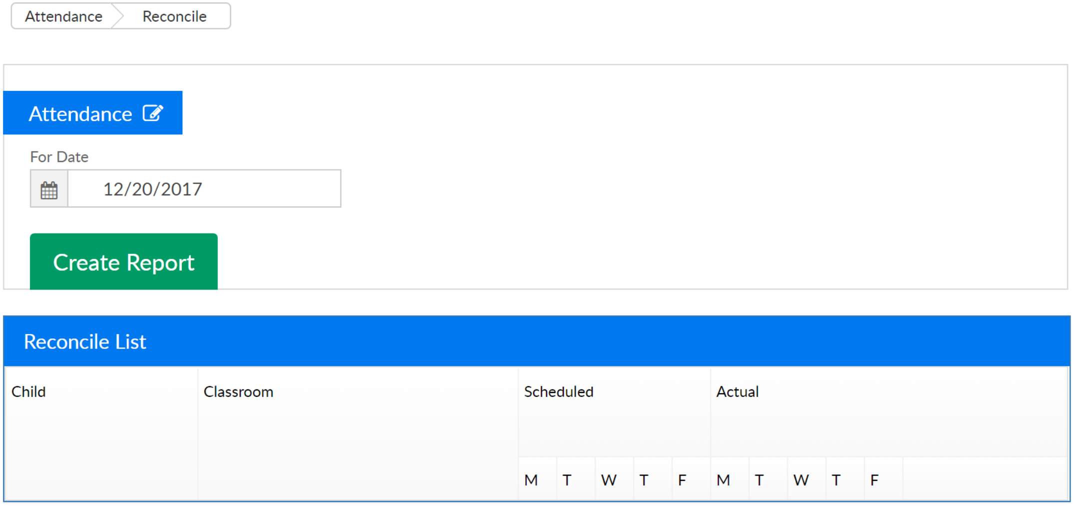
- Program/Room Pending- view a list of pending students by category/program and site.


Pending List

Category	Room/Program	School	Family	Child	Begin Date
Summer Camp	Full Day Summer Camp	DCW Transactional- Center 1	Brave Family	Merida Brave	06/10/2018
		DCW Transactional- Center 1	Brave Family	Merida Brave	06/17/2018
		DCW Transactional- Center 1	Brave Family	Merida Brave	06/03/2018
	Summer Camp Registration	DCW Transactional- Center 1	Brave Family	Merida Brave	05/28/2018

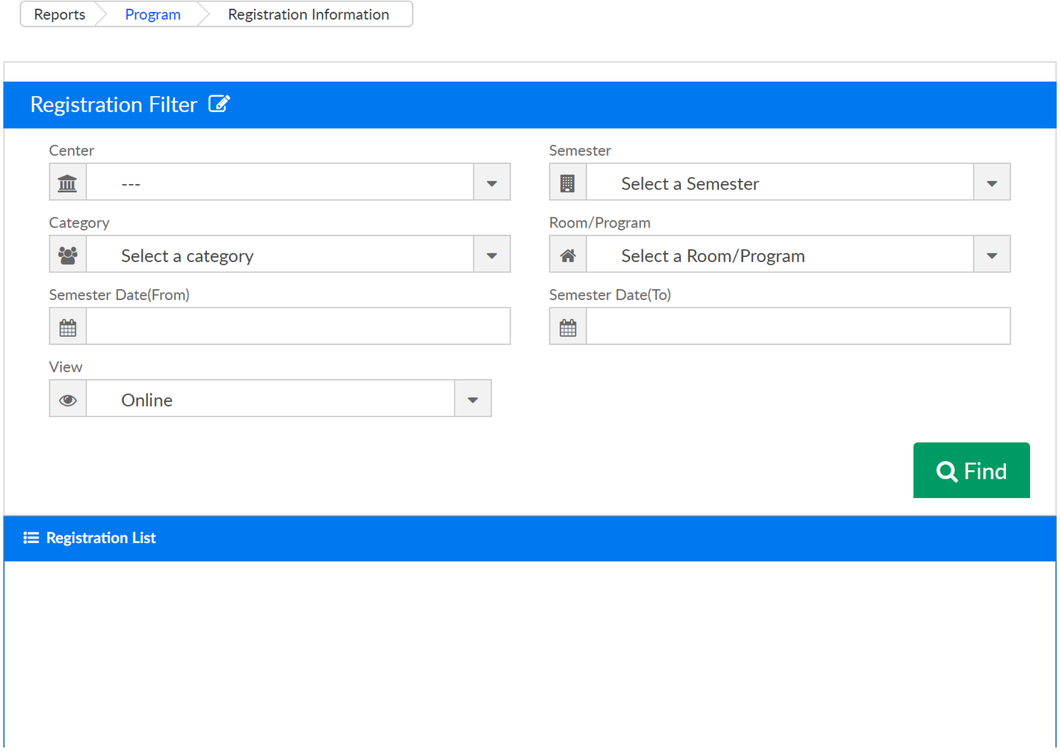
Export options: CSV | Excel | XML

- Weekly Reconciliation Report- a shortcut to the Attendance > Reconcile screen where users can see schedule to attendance by child and classroom for a specific day.



For Date
12/20/2017

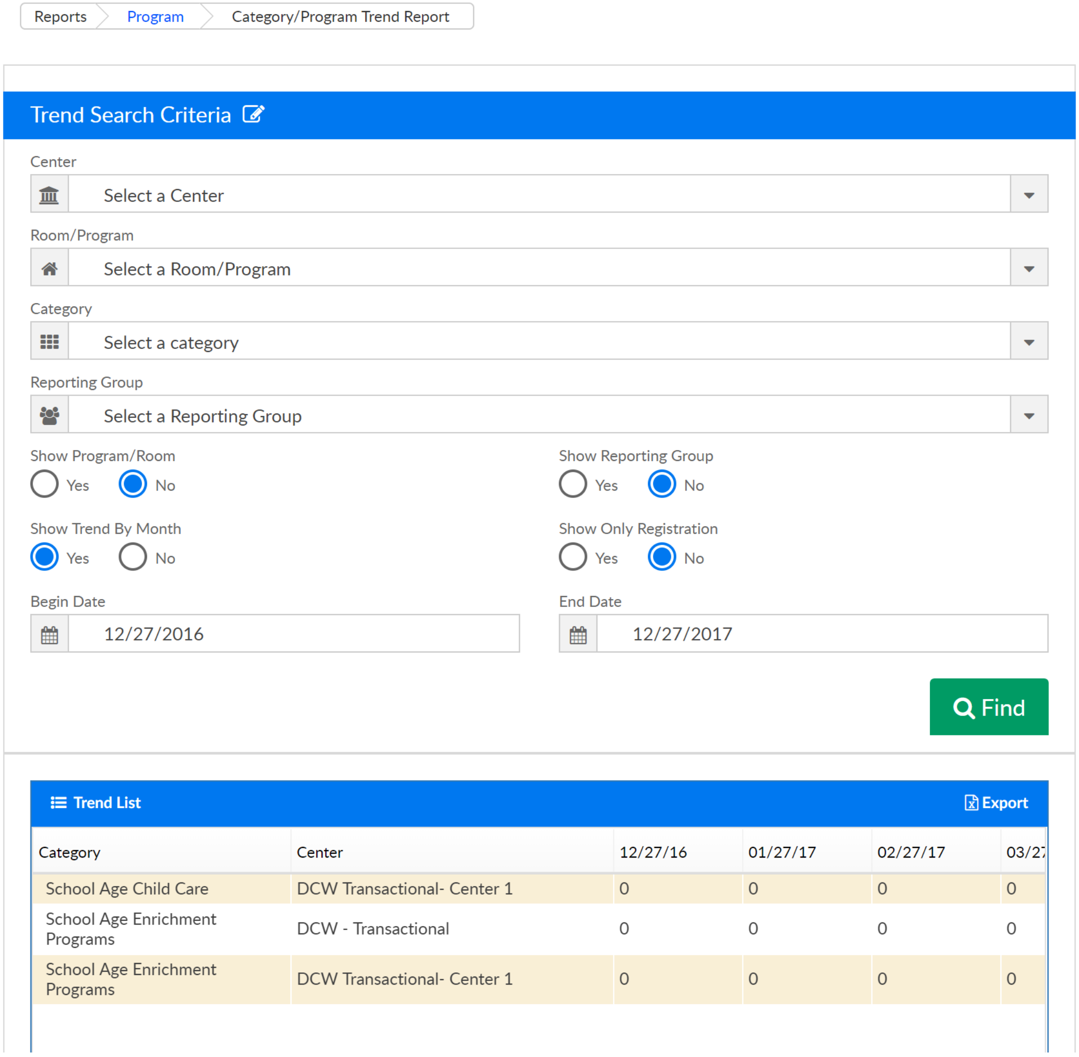
- Registration Information Report- view all registration information- from the portal or new registration page by a selection of criteria.



Center

Semester
Category
Room/Program
Semester Date(From)
Semester Date(To)
View
Online

- Category/Program Trend Report- This screen allows users the ability to see trends in programs or categories over a set time frame.



Trend Search Criteria

Center: Select a Center

Room/Program: Select a Room/Program

Category: Select a category

Reporting Group: Select a Reporting Group

Show Program/Room: ○ Yes ● No

Show Reporting Group: ○ Yes ● No

Show Trend By Month: ● Yes ○ No

Show Only Registration: ○ Yes ● No

Begin Date: 12/27/2016

End Date: 12/27/2017

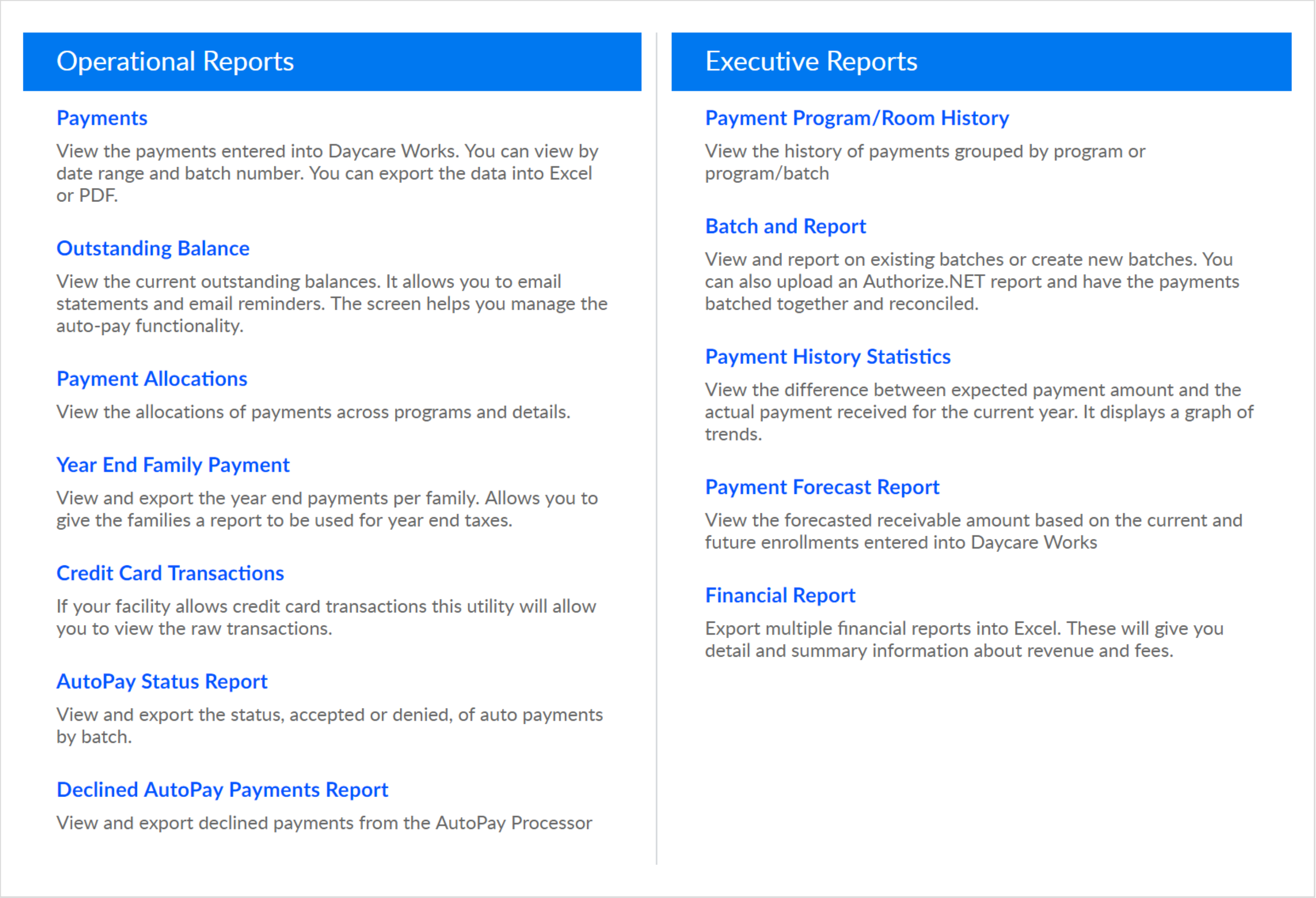
Trend List

Category	Center	12/27/16	01/27/17	02/27/17	03/27
School Age Child Care	DCW Transactional- Center 1	0	0	0	0
School Age Enrichment Programs	DCW - Transactional	0	0	0	0
School Age Enrichment Programs	DCW Transactional- Center 1	0	0	0	0

Reports > Payment

Last Modified on 12/27/2017 10:24 am EST

The Reports > Payments screen displays payment related reports.



Operational Reports

Payments

View the payments entered into Daycare Works. You can view by date range and batch number. You can export the data into Excel or PDF.

Outstanding Balance

View the current outstanding balances. It allows you to email statements and email reminders. The screen helps you manage the auto-pay functionality.

Payment Allocations

View the allocations of payments across programs and details.

Year End Family Payment

View and export the year end payments per family. Allows you to give the families a report to be used for year end taxes.

Credit Card Transactions

If your facility allows credit card transactions this utility will allow you to view the raw transactions.

AutoPay Status Report

View and export the status, accepted or denied, of auto payments by batch.

Declined AutoPay Payments Report

View and export declined payments from the AutoPay Processor

Executive Reports

Payment Program/Room History

View the history of payments grouped by program or program/batch

Batch and Report

View and report on existing batches or create new batches. You can also upload an Authorize.NET report and have the payments batched together and reconciled.

Payment History Statistics

View the difference between expected payment amount and the actual payment received for the current year. It displays a graph of trends.

Payment Forecast Report

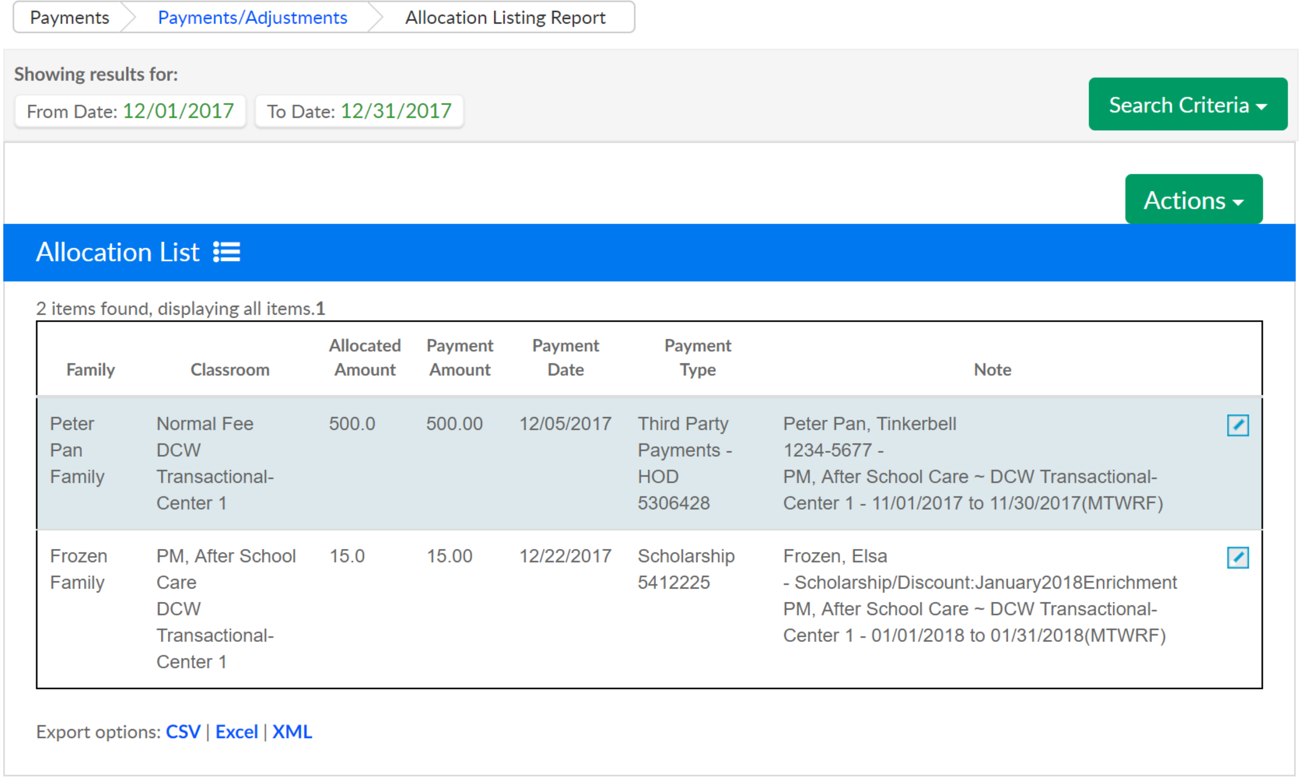
View the forecasted receivable amount based on the current and future enrollments entered into Daycare Works

Financial Report

Export multiple financial reports into Excel. These will give you detail and summary information about revenue and fees.

Operational Reports

- Payments- this is a shortcut to the Payments > Payments/Adjustments screen click here for a walk through of the screen.
- Outstanding Balance-this is a shortcut to the Payments > Outstanding screen, click here for a walk through of the screen.
- Payment Allocations- this is a shortcut to the Payments > Payments, Allocation Listing Report- select search criteria then press search. To pull a report, select the Actions button and choose to pull either the Export- Excel Grouped or Export- Excel Flat option.



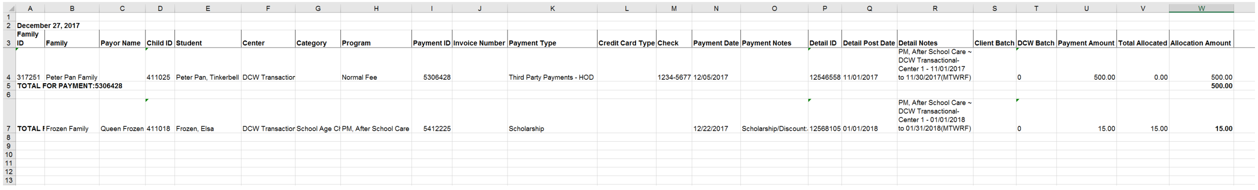
Showing results for:

From Date: 12/01/2017 To Date: 12/31/2017

2 items found, displaying all items.1

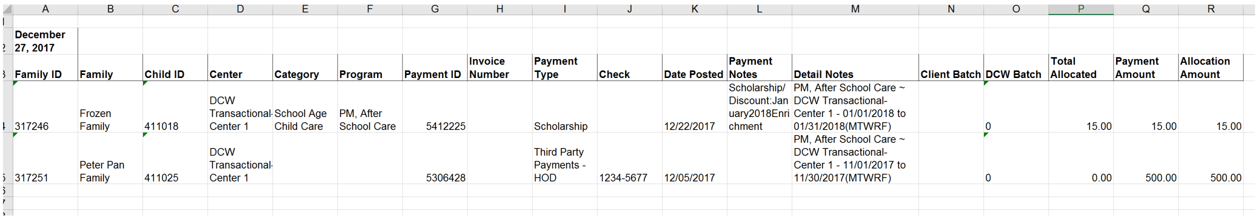
Family	Classroom	Allocated Amount	Payment Amount	Payment Date	Payment Type	Note
Peter Pan Family	Normal Fee DCW Transactional-Center 1	500.0	500.00	12/05/2017	Third Party Payments - HOD 5306428	Peter Pan, Tinkerbell 1234-5677 - PM, After School Care ~ DCW Transactional-Center 1 - 11/01/2017 to 11/30/2017(MTWRF)
Frozen Family	PM, After School Care DCW Transactional-Center 1	15.0	15.00	12/22/2017	Scholarship 5412225	Frozen, Elsa - Scholarship/Discount:January2018Enrichment PM, After School Care ~ DCW Transactional-Center 1 - 01/01/2018 to 01/31/2018(MTWRF)

  - Grouped export-



Family ID	Family	Payor Name	Child ID	Student	Center	Category	Program	Payment ID	Invoice Number	Payment Type	Credit Card Type	Check	Payment Date	Payment Notes	Detail ID	Detail Post Date	Detail Notes	Client Batch	DCW Batch	Payment Amount	Total Allocated	Allocation Amount
December 27, 2017																						
317251	Peter Pan Family		411025	Peter Pan, Tinkerbell	DCW Transactior		Normal Fee	5306428		Third Party Payments - HOD		1234-5677	12/05/2017		12546558	11/01/2017	PM, After School Care ~ DCW Transactional-Center 1 - 11/01/2017 to 11/30/2017(MTWRF)		0	500.00	0.00	500.00
TOTAL FOR PAYMENT:5306428																						**500.00**
TOTAL F	Frozen Family	Queen Frozen	411018	Frozen, Elsa	DCW Transactior	School Age Cl	PM, After School Care	5412225		Scholarship			12/22/2017	Scholarship/Discount:	12568105	01/01/2018	PM, After School Care ~ DCW Transactional-Center 1 - 01/01/2018 to 01/31/2018(MTWRF)		0	15.00	15.00	**15.00**

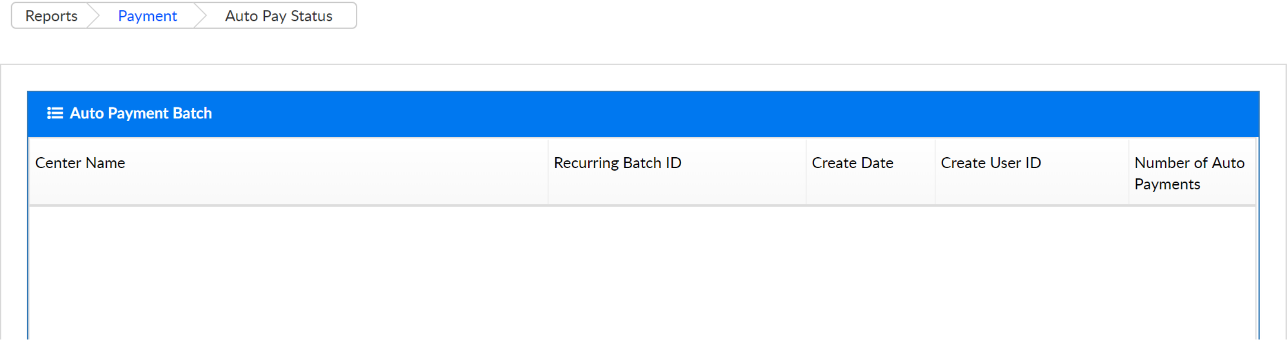
  - Flat export (the flat file will be better for analysis or sorting because there are fewer line breaks)-



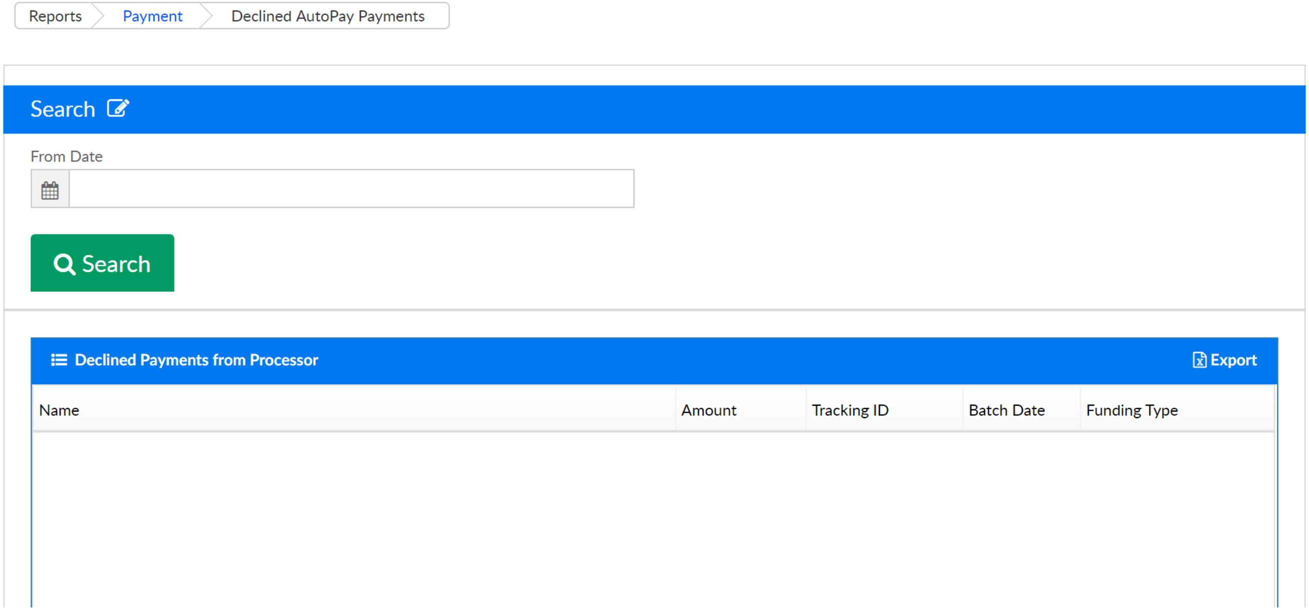
Family ID	Family	Child ID	Center	Category	Program	Payment ID	Invoice Number	Payment Type	Check	Date Posted	Payment Notes	Detail Notes	Client Batch	DCW Batch	Total Allocated	Payment Amount	Allocation Amount
December 27, 2017																	
317246	Frozen Family	411018	DCW Transactional-Center 1	School Age Child Care	PM, After School Care	5412225		Scholarship		12/22/2017	Scholarship/Discount:January2018Enrichment	PM, After School Care ~ DCW Transactional-Center 1 - 01/01/2018 to 01/31/2018(MTWRF)		0	15.00	15.00	15.00
317251	Peter Pan Family	411025	DCW Transactional-Center 1			5306428		Third Party Payments - HOD	1234-5677	12/05/2017		PM, After School Care ~ DCW Transactional-Center 1 - 11/01/2017 to 11/30/2017(MTWRF)		0	0.00	500.00	500.00

- Year End Family Payment- This link will take users to the Payments > Family Payment screen where tax statements can be created and exported- click here for directions.
- Credit Card Transactions- This link will take users to the Payments > Online/POS payments screen where transaction detail by date can be pulled, click here for directions.
- AutoPay Status Report- This screen will display AutoPay batches that have been processed by the system automatically in batch format or that have been processed by a center going to the Payments > AutoPay batch screen. When

payments have been processed, the number of AutoPays will display. Click on the blue number to open an Excel file with batch detail.

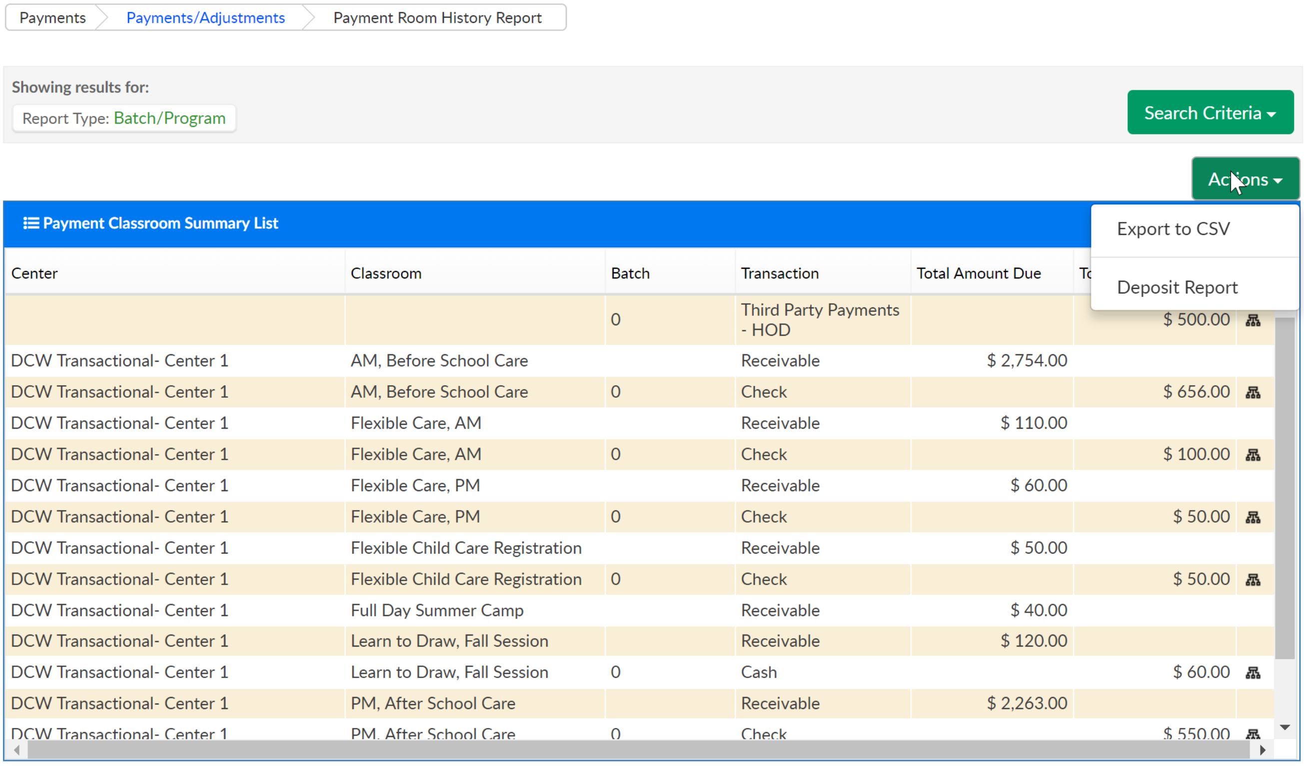


- Declined AutoPay Payment Report- This screen will display unsuccessful AutoPays, click the export option to download a report.



Executive Reports

- Payment Program/Room History- Payment detail organized by program, enter search criteria to select date detail. Select the actions icon to pull detail into a spreadsheet. The data can be filtered by Normal, Program or Batch/Program.



Showing results for:

Report Type: Batch/Program

Payment Classroom Summary List

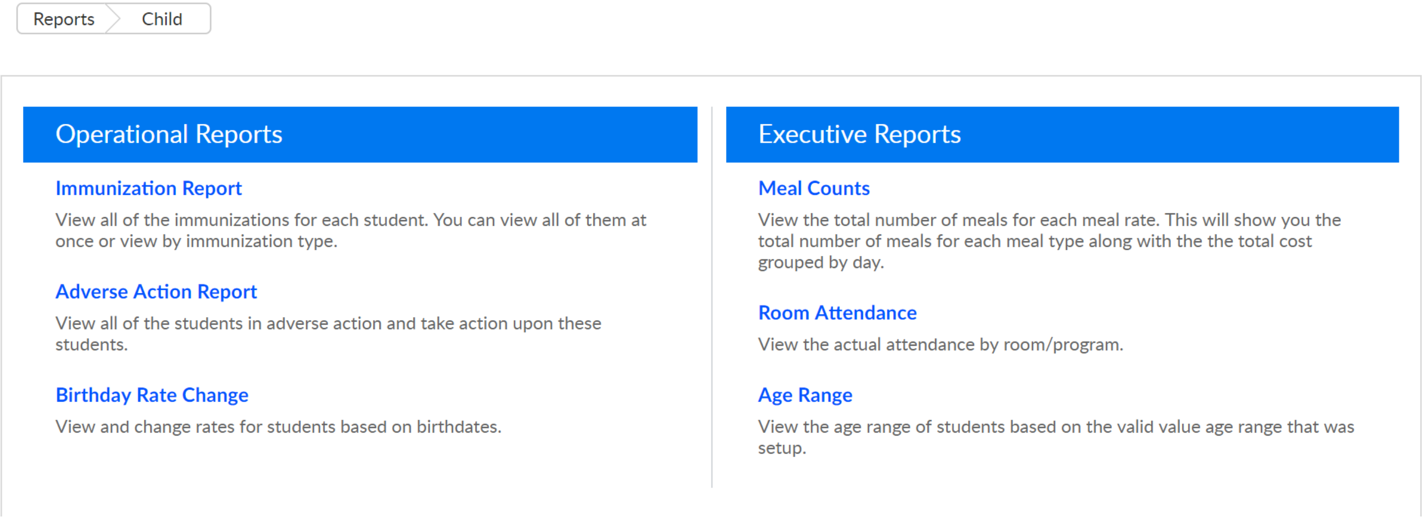
Center	Classroom	Batch	Transaction	Total Amount Due	To
		0	Third Party Payments - HOD		$ 500.00
DCW Transactional- Center 1	AM, Before School Care		Receivable	$ 2,754.00	
DCW Transactional- Center 1	AM, Before School Care	0	Check		$ 656.00
DCW Transactional- Center 1	Flexible Care, AM		Receivable	$ 110.00	
DCW Transactional- Center 1	Flexible Care, AM	0	Check		$ 100.00
DCW Transactional- Center 1	Flexible Care, PM		Receivable	$ 60.00	
DCW Transactional- Center 1	Flexible Care, PM	0	Check		$ 50.00
DCW Transactional- Center 1	Flexible Child Care Registration		Receivable	$ 50.00	
DCW Transactional- Center 1	Flexible Child Care Registration	0	Check		$ 50.00
DCW Transactional- Center 1	Full Day Summer Camp		Receivable	$ 40.00	
DCW Transactional- Center 1	Learn to Draw, Fall Session		Receivable	$ 120.00	
DCW Transactional- Center 1	Learn to Draw, Fall Session	0	Cash		$ 60.00
DCW Transactional- Center 1	PM, After School Care		Receivable	$ 2,263.00	
DCW Transactional- Center 1	PM, After School Care	0	Check		$ 550.00

- Batch and Report- Batch and Report allows sites to group payments together. This is most helpful when trying to reconcile deposits back to bank totals (bank reconciliation). Click here for more detail on Batch and Reporting.
- Payment History Statistics
- Payment Forecast Report
- Financial Report

Reports > Child

Last Modified on 03/13/2018 11:02 am EDT

From the Reports menu, select the Child option. The reports on this page are associated to the chid record- they incldue immunization, birthday, meal counts, age range reports.



Reports > Child

Operational Reports

Immunization Report
View all of the immunizations for each student. You can view all of them at once or view by immunization type.

Adverse Action Report
View all of the students in adverse action and take action upon these students.

Birthday Rate Change
View and change rates for students based on birthdates.

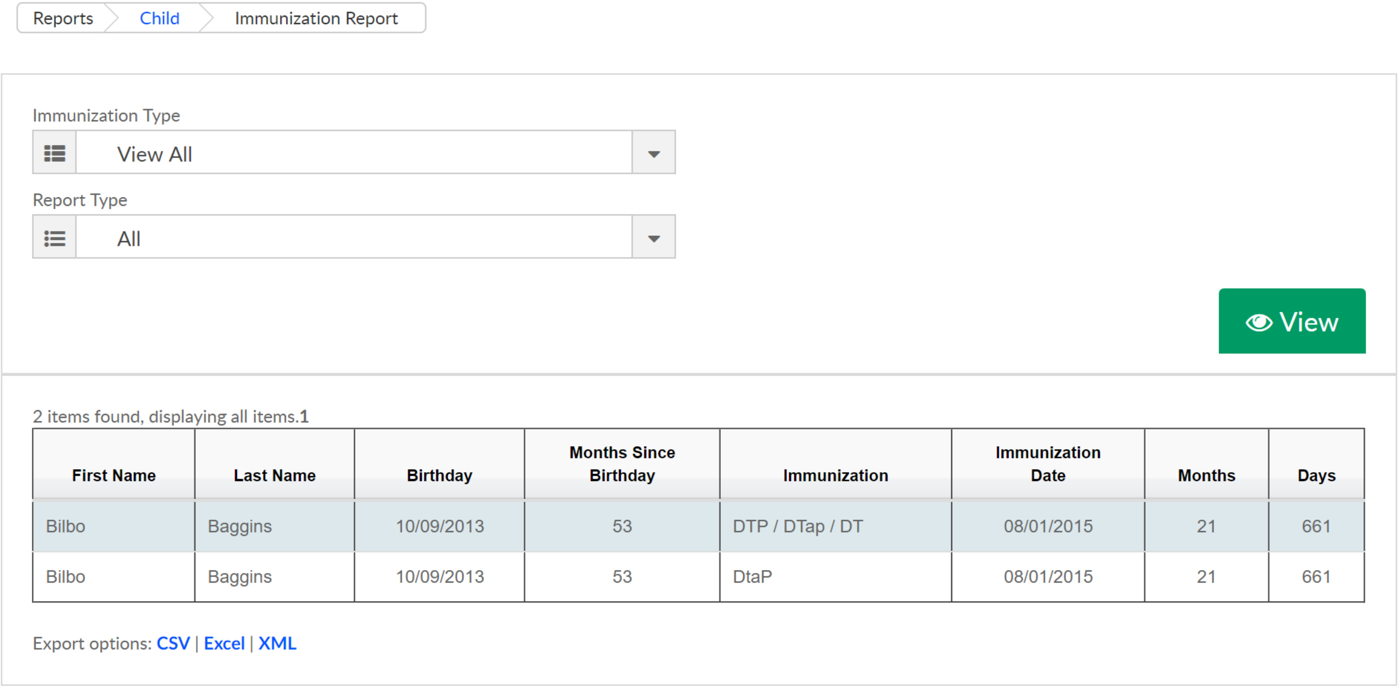
Executive Reports

Meal Counts
View the total number of meals for each meal rate. This will show you the total number of meals for each meal type along with the the total cost grouped by day.

Room Attendance
View the actual attendance by room/program.

Age Range
View the age range of students based on the valid value age range that was setup.

Immunization Report- View all of the immunizations for each student. You can view all of them at once or view by immunization type.



Reports > Child > Immunization Report

Immunization Type: View All

Report Type: All

2 items found, displaying all items.1

First Name	Last Name	Birthday	Months Since Birthday	Immunization	Immunization Date	Months	Days
Bilbo	Baggins	10/09/2013	53	DTP / DTap / DT	08/01/2015	21	661
Bilbo	Baggins	10/09/2013	53	DtaP	08/01/2015	21	661

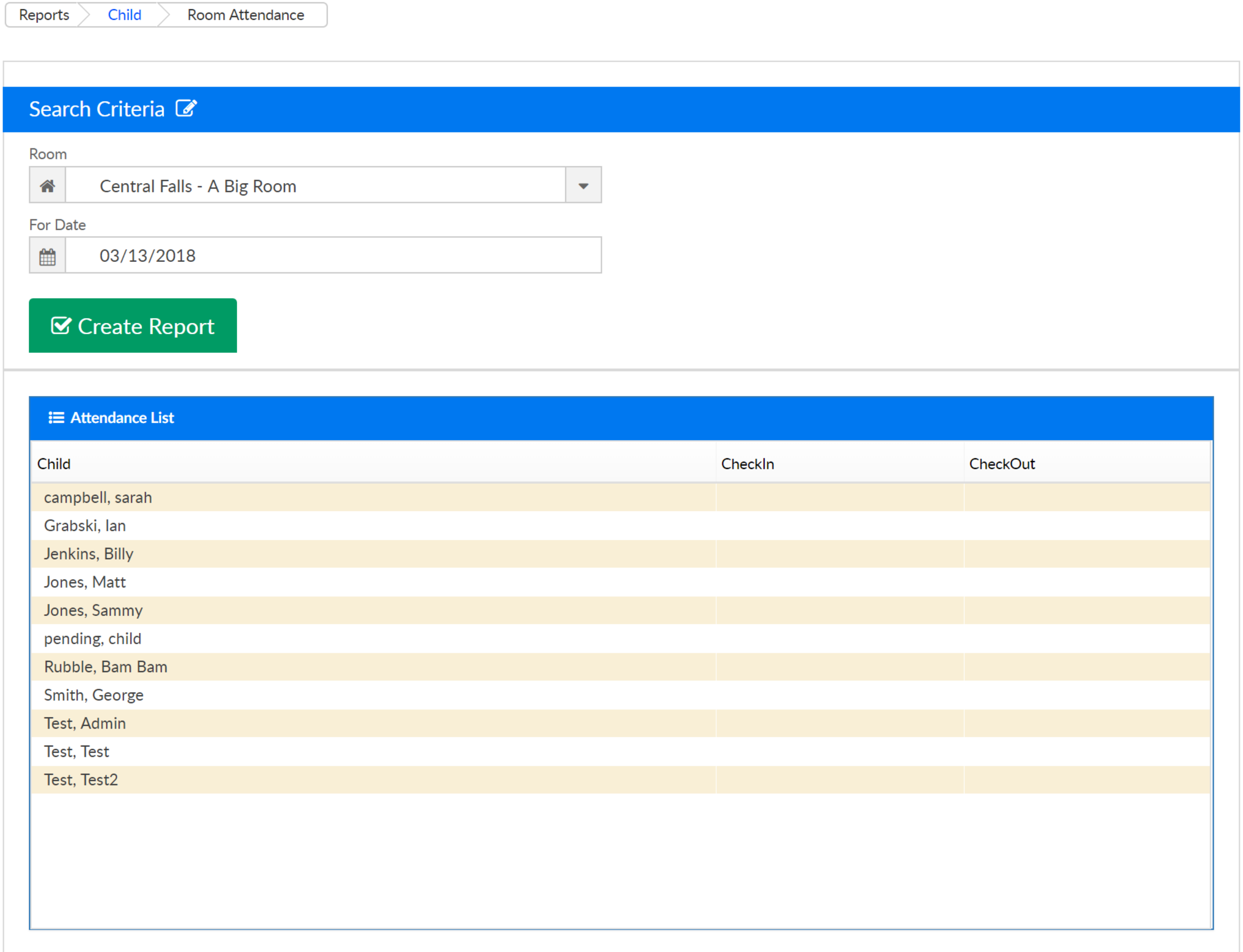
Export options: CSV | Excel | XML

Adverse Action- View all of the students in adverse action and take action upon these students.

Birthday Rate Change- View and change rates for students based on birthdates.

Meal Counts- View the total number of meals for each meal rate. This will show you the total number of meals for each meal type along with the the total cost grouped by day.

Room Attendance- View the actual attendance by room/program.

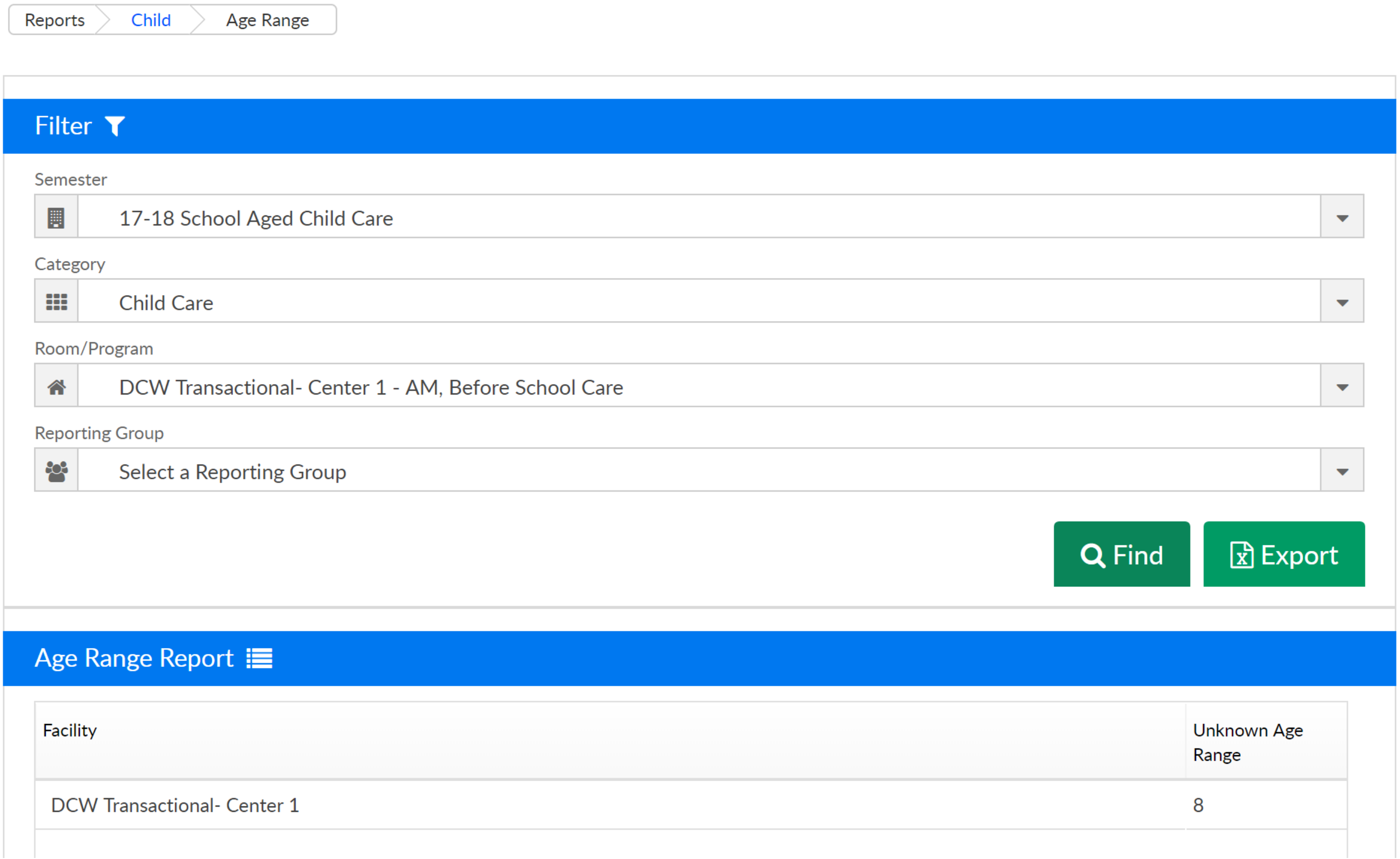


Room: Central Falls - A Big Room

For Date: 03/13/2018

Child	CheckIn	CheckOut
campbell, sarah		
Grabski, Ian		
Jenkins, Billy		
Jones, Matt		
Jones, Sammy		
pending, child		
Rubble, Bam Bam		
Smith, George		
Test, Admin		
Test, Test		
Test, Test2		

Age Range- View the age range of students based on the valid value age range that was setup.



Semester: 17-18 School Aged Child Care

Category: Child Care

Room/Program: DCW Transactional- Center 1 - AM, Before School Care

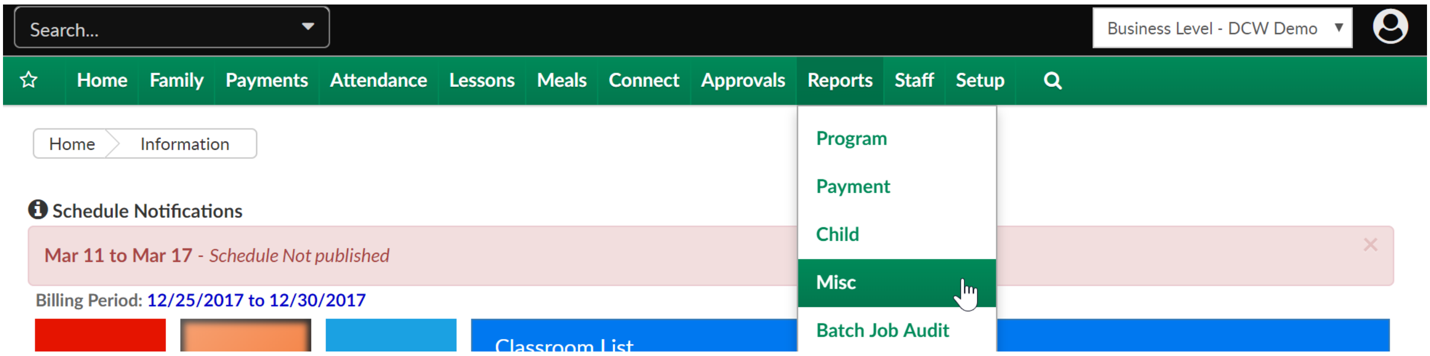
Reporting Group: Select a Reporting Group

Facility	Unknown Age Range
DCW Transactional- Center 1	8

Reports > Misc

Last Modified on 03/13/2018 11:13 am EDT

From the Reports menu, select the Misc option.

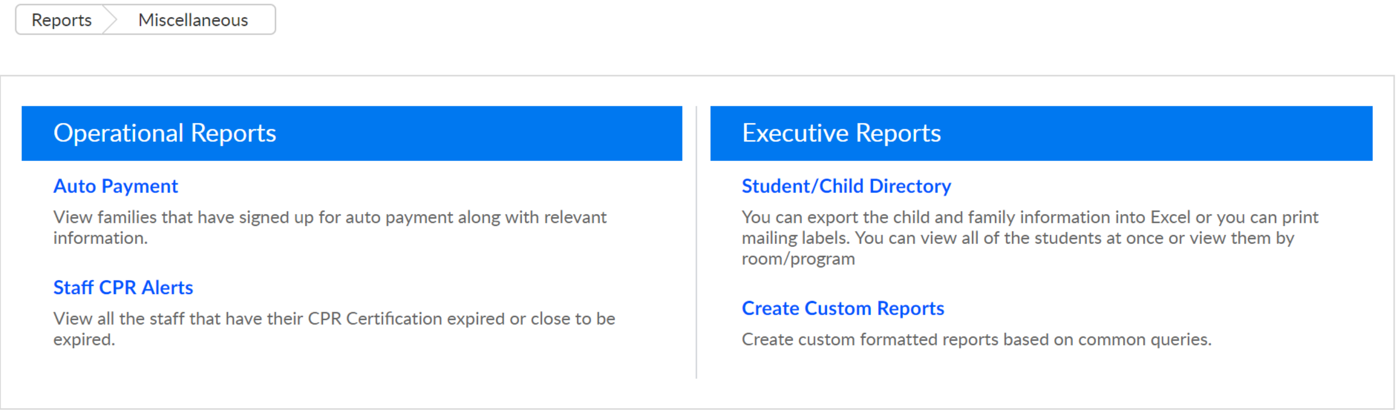


Schedule Notifications

Mar 11 to Mar 17 - *Schedule Not published*

Billing Period: 12/25/2017 to 12/30/2017

From this screen, the below reports can be selected-



Operational Reports

Auto Payment

View families that have signed up for auto payment along with relevant information.

Staff CPR Alerts

View all the staff that have their CPR Certification expired or close to be expired.

Executive Reports

Student/Child Directory

You can export the child and family information into Excel or you can print mailing labels. You can view all of the students at once or view them by room/program

Create Custom Reports

Create custom formatted reports based on common queries.

Auto Payment- View families that have signed up for auto payment along with relevant information.

Auto Payment

Family	Credit Type	Holder	Address	Email	Phone
Adams D Family Effective: 07/25/2016	Visa	David Adams	156 Long Lake Troy MI 48084	dadams12@abc.com	4645551212
Anderson Family Effective: 10/18/2016	Visa	Mom Anderson	11 Main Warren MI 48093	ckulick@cirrusgroup.com	248-465-4343
Bam Bam Family Effective: 10/17/2016	Visa	Guardian 1 Bam Bam	Address 1 City MI 48084	test@abc.com	248-546-6767
Billings Family Effective: 06/15/2017	Visa	Guardian 1 Billings	11 Main St. Rochester MI 48307	jhite@cirrusgroup.com	248-555-6666
Brady Family Effective: 08/01/2017	Visa	Tom Brady	123 Pigskin Way Montreal NY 00987	aa@abcc.com	313-555-1212
Martin Family Effective: 11/01/2017	Visa	Tamara Martin	2144 Westward Troy MI 48044	ckulick@cirrusgroup.com	740-888-5555
pending Family Effective: 07/09/2015	MasterCard	sfdsadf fdsfs	sdfsfdafddsaf sdfsaddsf MI 48044	none@none.com	5555555555
Robbins Family Effective: 10/06/2014	MasterCard	Wade Robbins	test test MI 48307	wrobbins@cirrusgroup.com	555-1212
Sadasivan Family Effective: 09/29/2014	MasterCard	Anil Sadasivan	My Address Rochester Hills MI 48084	myemail@cirrusgroyp.com	1234567890
Stewart Family Effective: 01/03/2016	Visa	Jessica Stewart	123 State Street Rochester MI 48307	test@test.com	555-222-1122

Export options: CSV | Excel | XML

Staff CPR Alerts- View all the staff that have their CPR Certification expired or close to be expired.

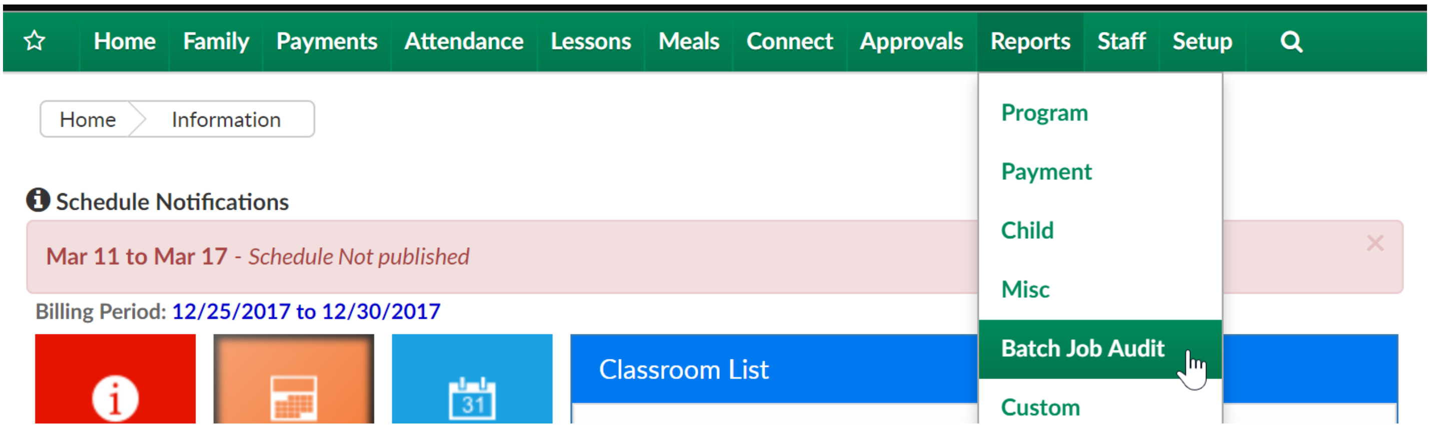
Student/Child Directory- You can export the child and family information into Excel or you can print mailing labels. You can view all of the students at once or view them by room/program

Create Custom Reports- Create custom formatted reports based on common queries.

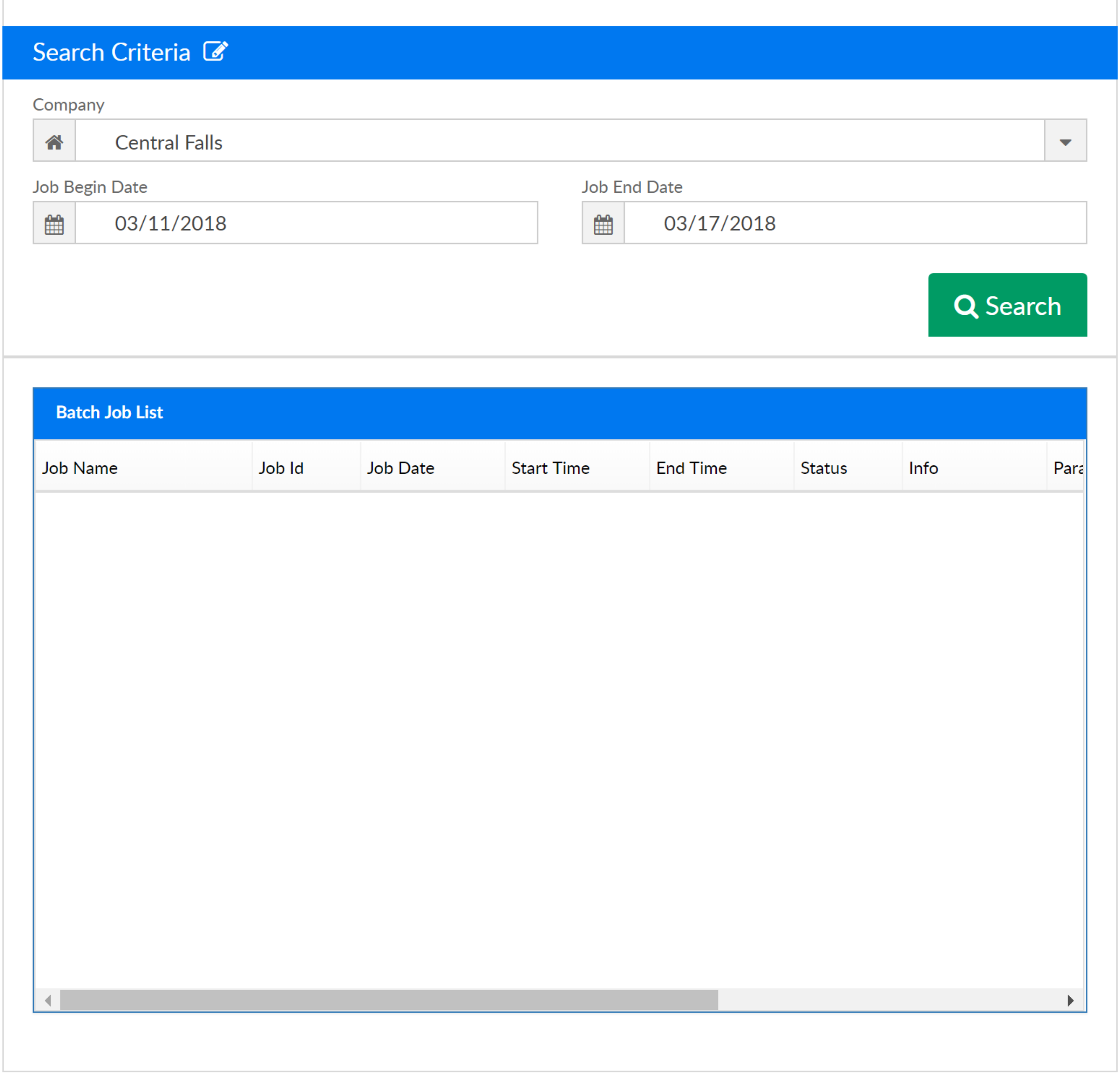
Reports > Batch Job Audit

Last Modified on 03/13/2018 11:23 am EDT

From the Reports menu, select the Batch Job Audit option-



The Batch Job Audit screen willl display detail of batch jobs that have been set to run- such as autopay jobs, late payment fee batch jobs.



Search Criteria

Company

Central Falls

Job Begin Date

03/11/2018

Job End Date

03/17/2018

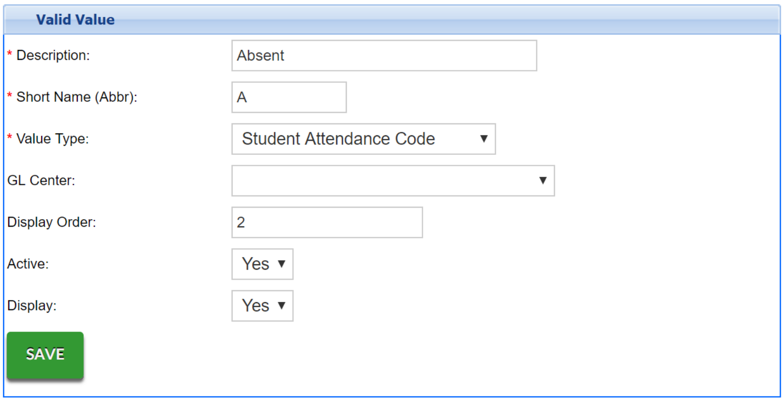
Batch Job List

Job Name	Job Id	Job Date	Start Time	End Time	Status	Info	Para

Attendance- Absent Days Taken- Excel (Activity ID 966)

Last Modified on 05/29/2018 8:34 am EDT

Generates a report that displays absent days taken for a given date range. This would mean that the child would have been recorded with the Student Attendance code of A. (To setup an absent Student Attendance Code valid value click here)



Valid Value

* Description: Absent

* Short Name (Abbr): A

* Value Type: Student Attendance Code

GL Center:

Display Order: 2

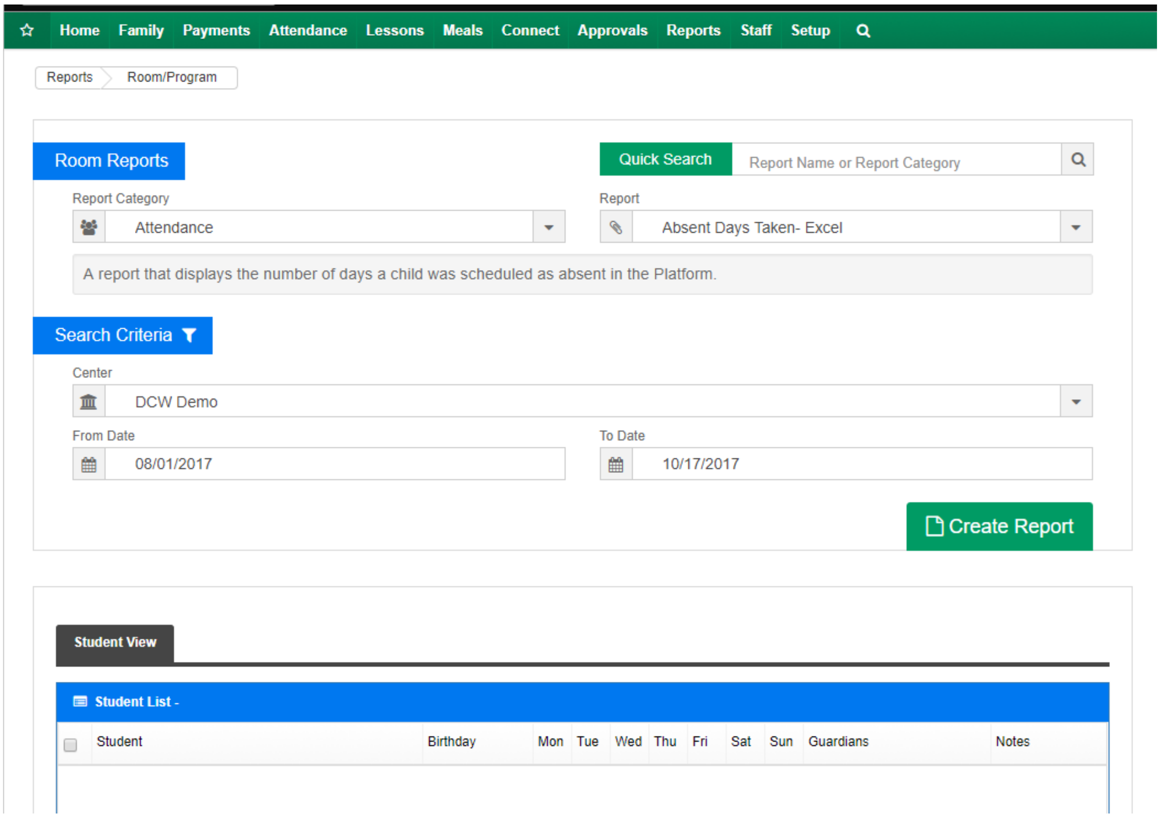
Active: Yes

Display: Yes

This report includes center name, parent ID, parent name, child ID, child name, funding type, child age, district, start date, discharge date, status, home phone, number of days absent, and billing rate. You must select From Date and To Date. You must select From Date and To Date

- Center: The name of the center the child recorded their absent days.
- Parent ID: The DCW ID number for the legal guardian for the child.
- Parent Name: The last name and first name of the legal guardian for the child.
- Child ID: The DCW ID number for the child.
- Child Name: The last name and first name for the child.
- Funding Type: The funding type assigned to the child in the Platform.
- Child Age: The age of the child in the Platform, in years and months.
- District: The name of the district assigned to the child.
- Start Date: The date the child started in the Platform.
- Discharge Date: The date the child was withdrawn in the Platform.
- Status (active or termed): The current status of the child.
- Home Phone: The home telephone number for the child.
- Number of days absent: The number of days the child has been scheduled as absent for the date range in the Absent Days Taken section.

- Billing Rate: The amount charged for the child per week.



Report Category: Attendance

Report: Absent Days Taken- Excel

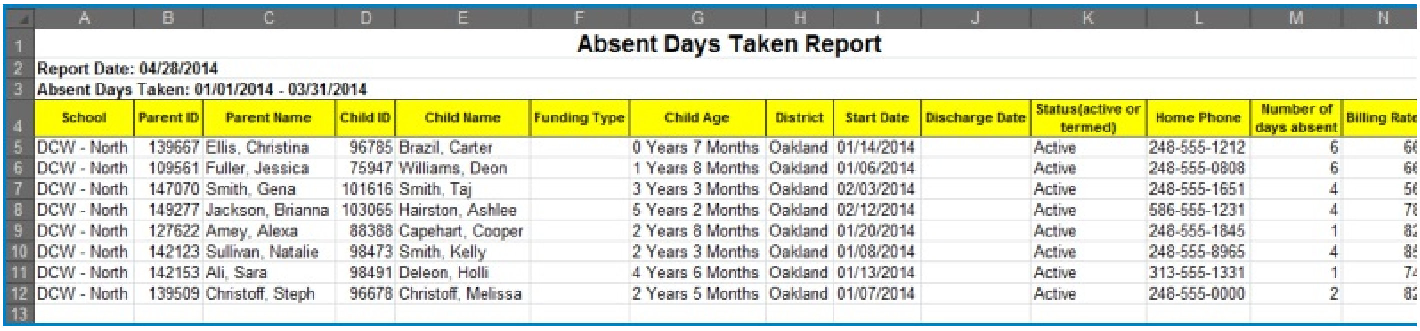
A report that displays the number of days a child was scheduled as absent in the Platform.

Center: DCW Demo

From Date: 08/01/2017

To Date: 10/17/2017

The report will display the below fields-



Absent Days Taken Report

Report Date: 04/28/2014

Absent Days Taken: 01/01/2014 - 03/31/2014

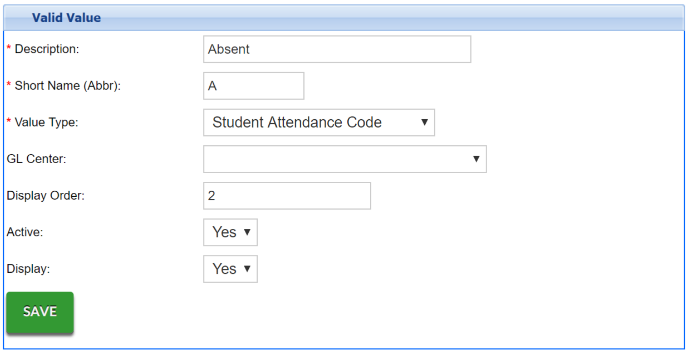
School	Parent ID	Parent Name	Child ID	Child Name	Funding Type	Child Age	District	Start Date	Discharge Date	Status(active or termed)	Home Phone	Number of days absent	Billing Rate
DCW - North	139667	Ellis, Christina	96785	Brazil, Carter		0 Years 7 Months	Oakland	01/14/2014		Active	248-555-1212	6	6
DCW - North	109561	Fuller, Jessica	75947	Williams, Deon		1 Years 8 Months	Oakland	01/06/2014		Active	248-555-0808	6	6
DCW - North	147070	Smith, Gena	101616	Smith, Taj		3 Years 3 Months	Oakland	02/03/2014		Active	248-555-1651	4	5
DCW - North	149277	Jackson, Brianna	103065	Hairston, Ashlee		5 Years 2 Months	Oakland	02/12/2014		Active	586-555-1231	4	7
DCW - North	127622	Amey, Alexa	88388	Capehart, Cooper		2 Years 8 Months	Oakland	01/20/2014		Active	248-555-1845	1	8
DCW - North	142123	Sullivan, Natalie	98473	Smith, Kelly		2 Years 3 Months	Oakland	01/08/2014		Active	248-555-8965	4	8
DCW - North	142153	Ali, Sara	98491	Deleon, Holli		4 Years 6 Months	Oakland	01/13/2014		Active	313-555-1331	1	7
DCW - North	139509	Christoff, Steph	96678	Christoff, Melissa		2 Years 5 Months	Oakland	01/07/2014		Active	248-555-0000	2	8

Attendance- Absent Roster - PDF (Activity ID 1031)

Last Modified on 05/29/2018 8:35 am EDT

This report generates a PDF report of child absences for a given date range. Report includes parent name, child name, number of days absent, dates absent, and reason.

This would mean that the child would have been recorded with the Student Attendance code of A. (To setup an absent Student Attendance Code valid value click here)



Valid Value

* Description: Absent

* Short Name (Abbr): A

* Value Type: Student Attendance Code

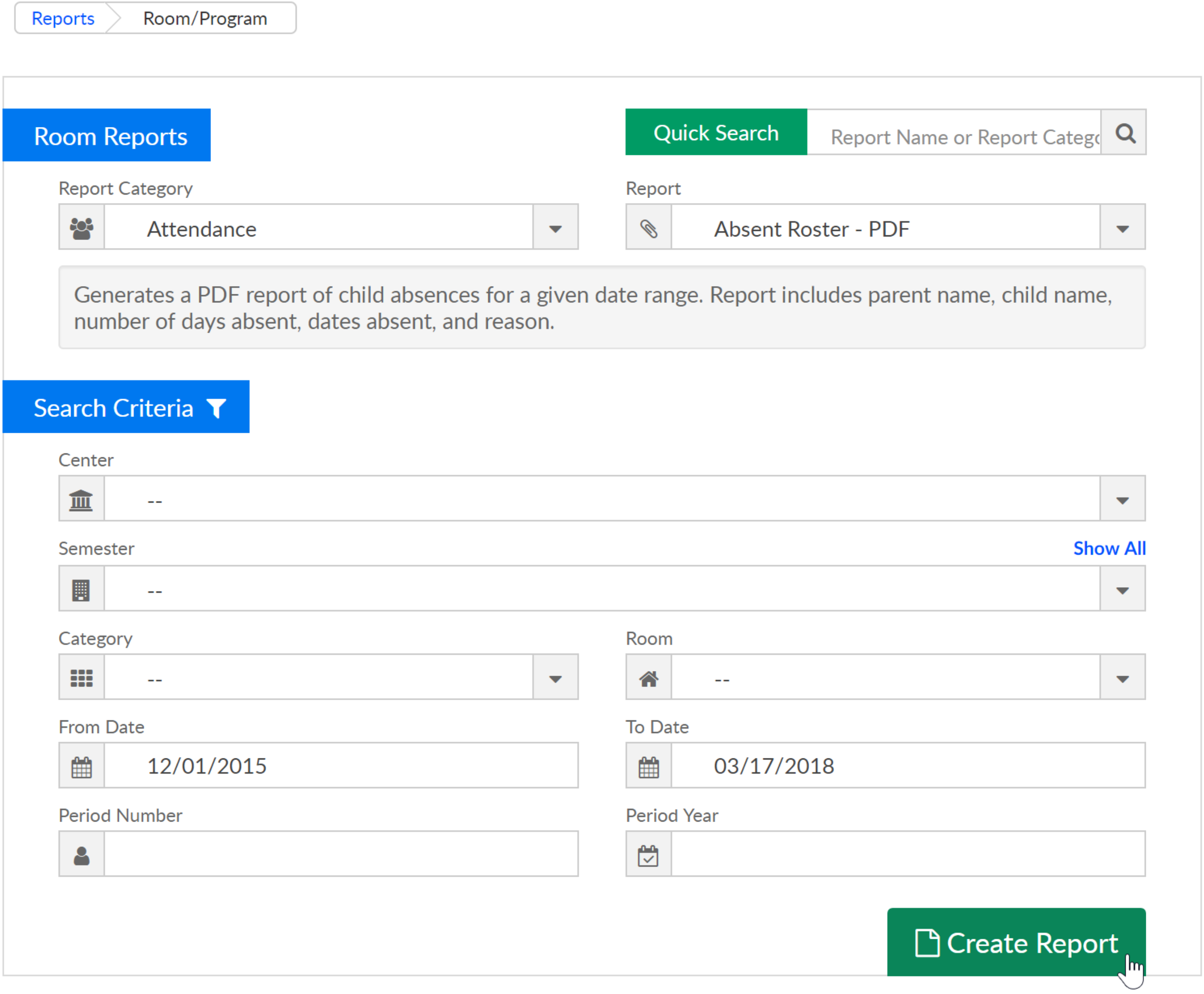
GL Center:

Display Order: 2

Active: Yes

Display: Yes

Required fields- From and To date.



Report Category: Attendance

Report: Absent Roster - PDF

Generates a PDF report of child absences for a given date range. Report includes parent name, child name, number of days absent, dates absent, and reason.

Center: --

Semester: --

Category: --

Room: --

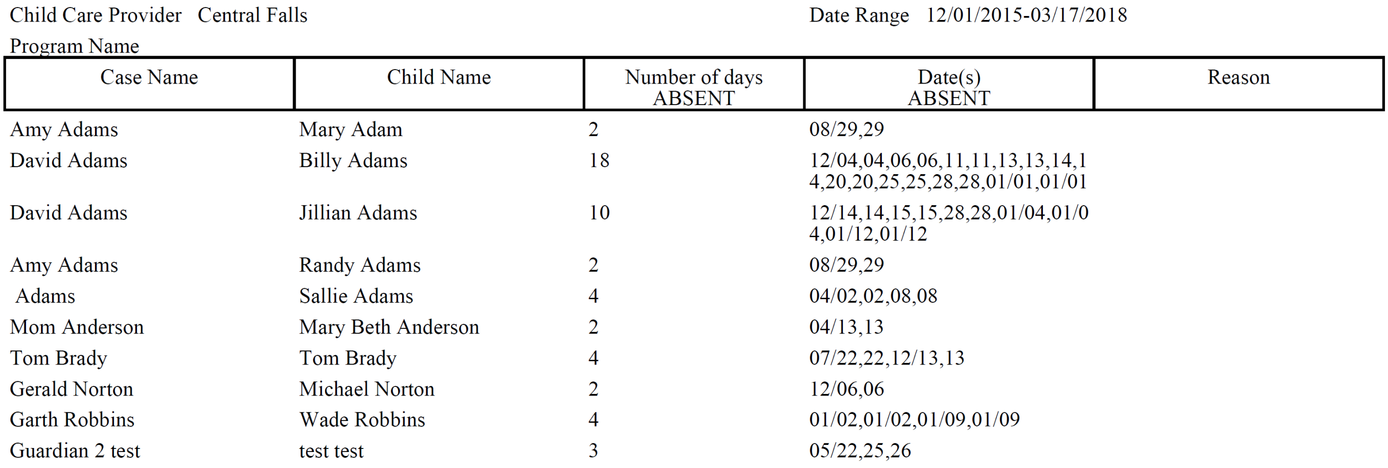
From Date: 12/01/2015

To Date: 03/17/2018

Period Number:

Period Year:

Report example-



Child Care Provider Central Falls

Date Range 12/01/2015-03/17/2018

Program Name

Case Name	Child Name	Number of days ABSENT	Date(s) ABSENT	Reason
Amy Adams	Mary Adam	2	08/29,29	
David Adams	Billy Adams	18	12/04,04,06,06,11,11,13,13,14,14,20,20,25,25,28,28,01/01,01/01	
David Adams	Jillian Adams	10	12/14,14,15,15,28,28,01/04,01/04,01/12,01/12	
Amy Adams	Randy Adams	2	08/29,29	
Adams	Sallie Adams	4	04/02,02,08,08	
Mom Anderson	Mary Beth Anderson	2	04/13,13	
Tom Brady	Tom Brady	4	07/22,22,12/13,13	
Gerald Norton	Michael Norton	2	12/06,06	
Garth Robbins	Wade Robbins	4	01/02,01/02,01/09,01/09	
Guardian 2 test	test test	3	05/22,25,26	

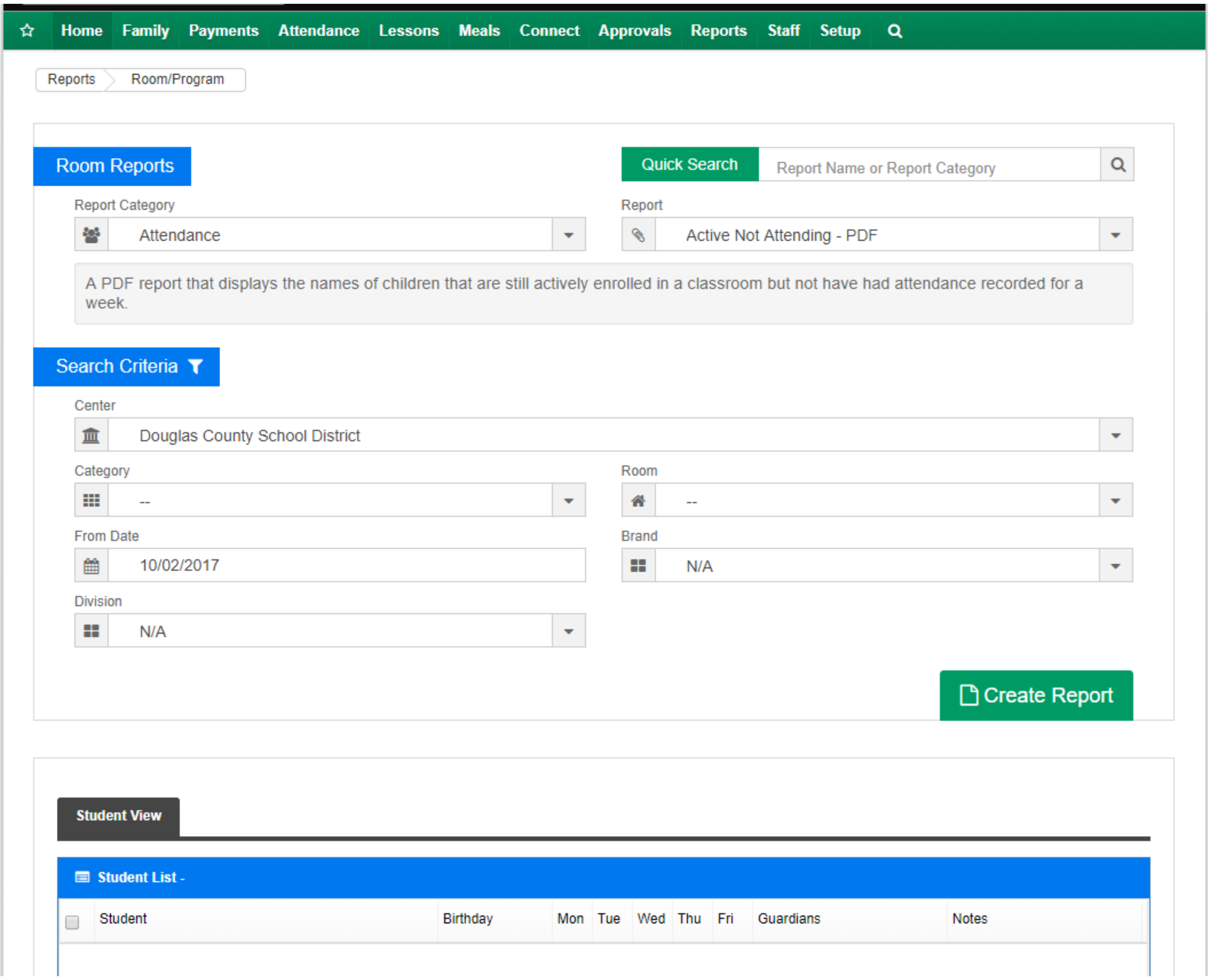
Attendance- Active Not Attending - PDF (Activity ID 632)

Last Modified on 05/29/2018 8:21 am EDT

This report lists children by Last Name, First Name, days of the week that they are scheduled to attend, Last Attendance Date, and Number of Days Since Last Attended.

This report is used to verify children who have a schedule and are considered active but do not have attendance.

Required fields: From Date which will act as an as of date.



Report Category: Attendance

Report: Active Not Attending - PDF

A PDF report that displays the names of children that are still actively enrolled in a classroom but not have had attendance recorded for a week.

Center: Douglas County School District

Category: --

Room: --

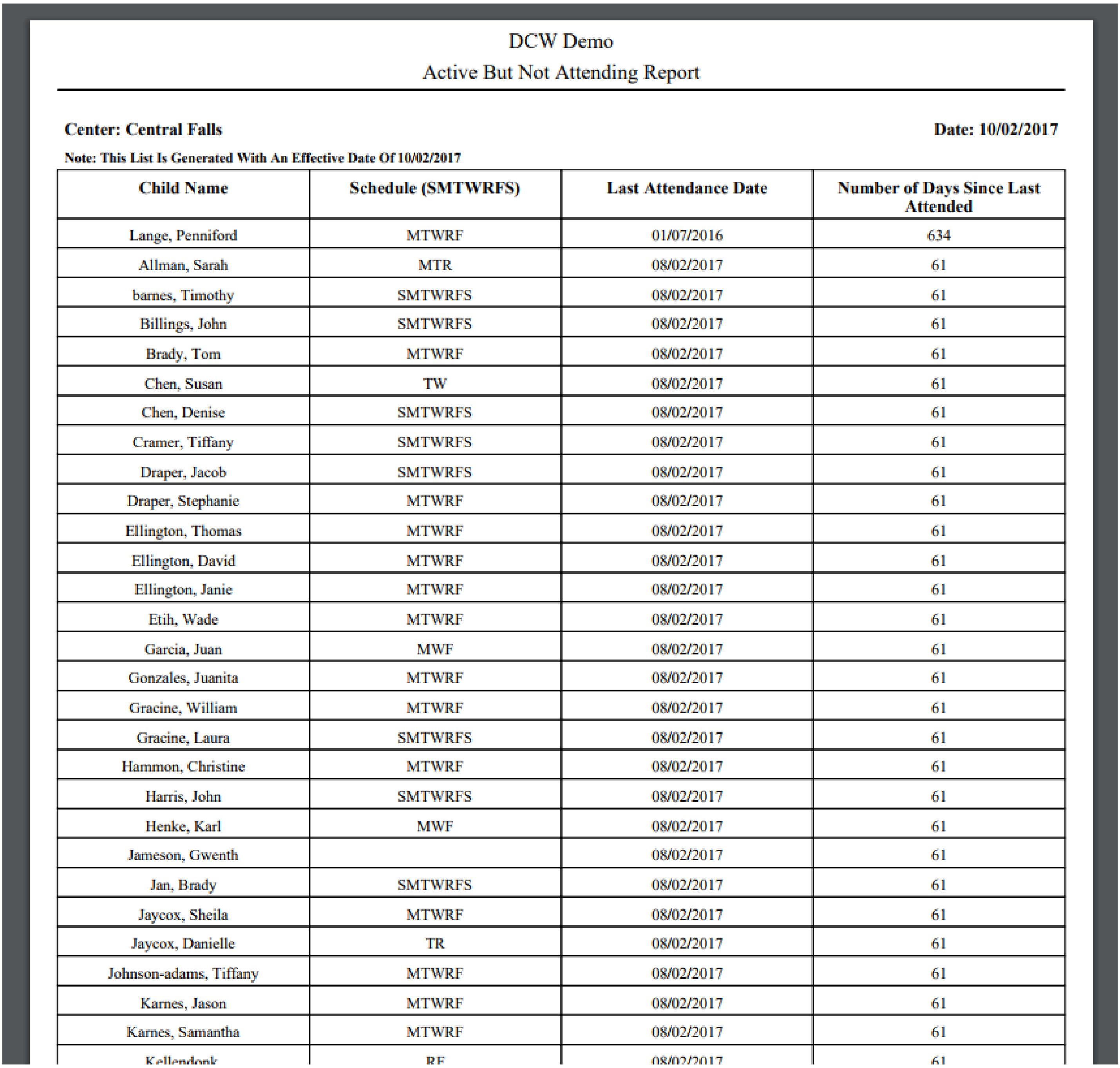
From Date: 10/02/2017

Brand: N/A

Division: N/A

☐	Student	Birthday	Mon	Tue	Wed	Thu	Fri	Guardians	Notes

Report Example-



DCW Demo

Active But Not Attending Report

Center: Central Falls **Date: 10/02/2017**

Note: This List Is Generated With An Effective Date Of 10/02/2017

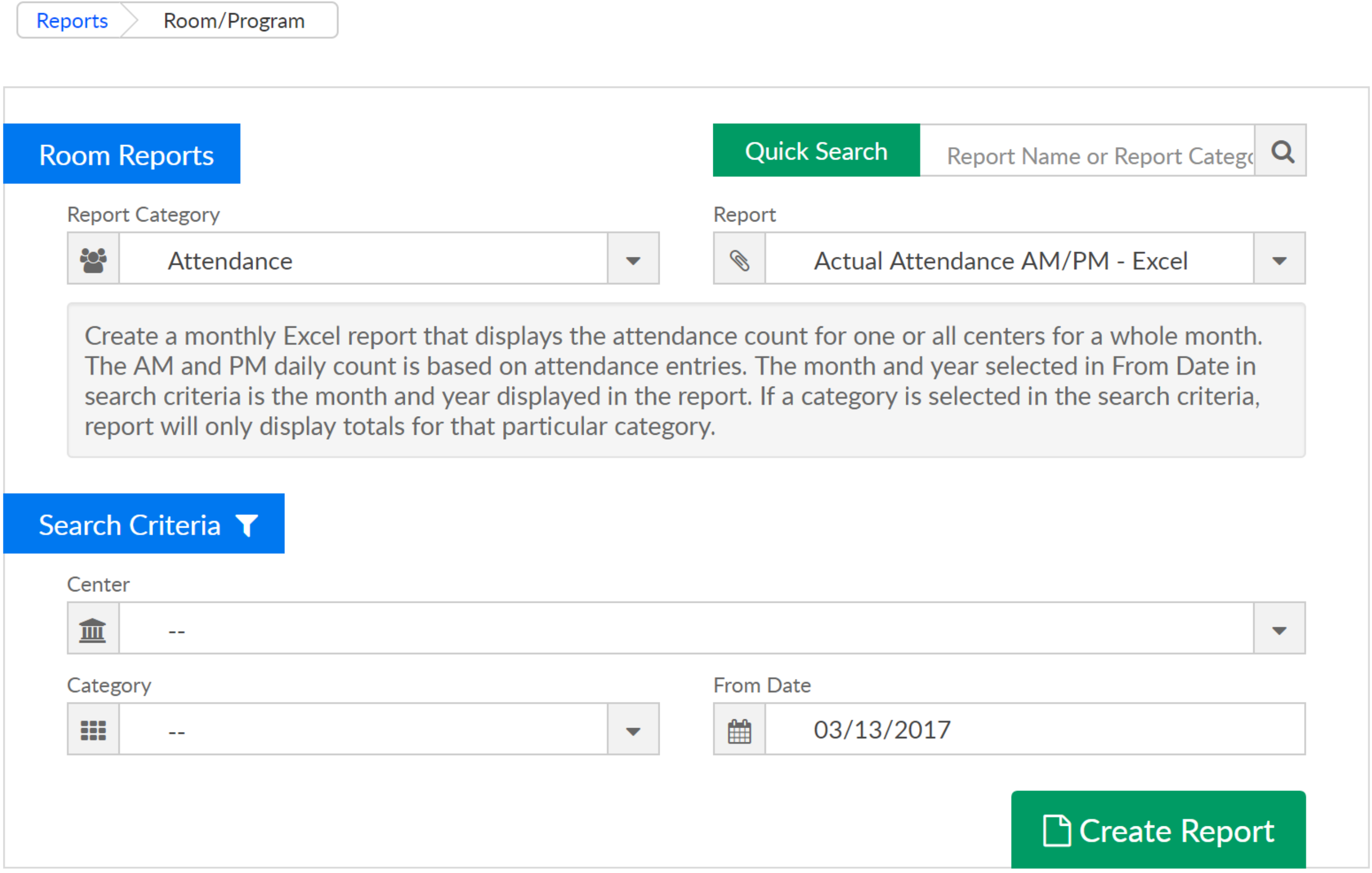
Child Name	Schedule (SMTWRFS)	Last Attendance Date	Number of Days Since Last Attended
Lange, Penniford	MTWRF	01/07/2016	634
Allman, Sarah	MTR	08/02/2017	61
barnes, Timothy	SMTWRFS	08/02/2017	61
Billings, John	SMTWRFS	08/02/2017	61
Brady, Tom	MTWRF	08/02/2017	61
Chen, Susan	TW	08/02/2017	61
Chen, Denise	SMTWRFS	08/02/2017	61
Cramer, Tiffany	SMTWRFS	08/02/2017	61
Draper, Jacob	SMTWRFS	08/02/2017	61
Draper, Stephanie	MTWRF	08/02/2017	61
Ellington, Thomas	MTWRF	08/02/2017	61
Ellington, David	MTWRF	08/02/2017	61
Ellington, Janie	MTWRF	08/02/2017	61
Etih, Wade	MTWRF	08/02/2017	61
Garcia, Juan	MWF	08/02/2017	61
Gonzales, Juanita	MTWRF	08/02/2017	61
Gracine, William	MTWRF	08/02/2017	61
Gracine, Laura	SMTWRFS	08/02/2017	61
Hammon, Christine	MTWRF	08/02/2017	61
Harris, John	SMTWRFS	08/02/2017	61
Henke, Karl	MWF	08/02/2017	61
Jameson, Gwenth		08/02/2017	61
Jan, Brady	SMTWRFS	08/02/2017	61
Jaycox, Sheila	MTWRF	08/02/2017	61
Jaycox, Danielle	TR	08/02/2017	61
Johnson-adams, Tiffany	MTWRF	08/02/2017	61
Karnes, Jason	MTWRF	08/02/2017	61
Karnes, Samantha	MTWRF	08/02/2017	61
Kellendonk	RF	08/02/2017	61

Attendance- Actual Attendance AM/PM - Excel (Activity ID 1216)

Last Modified on 05/29/2018 8:21 am EDT

The Actual Attendanec AM/PM- Excel report displays counts of students who have attended for a month at a time. Trt. If a category is selected in the search criteria, report will only display totals for that particular category.

In order for this count to be accurate, the AM/PM/Full Day designation has to be entered on a child's program/room assignment.



Report Category: Attendance

Report: Actual Attendance AM/PM - Excel

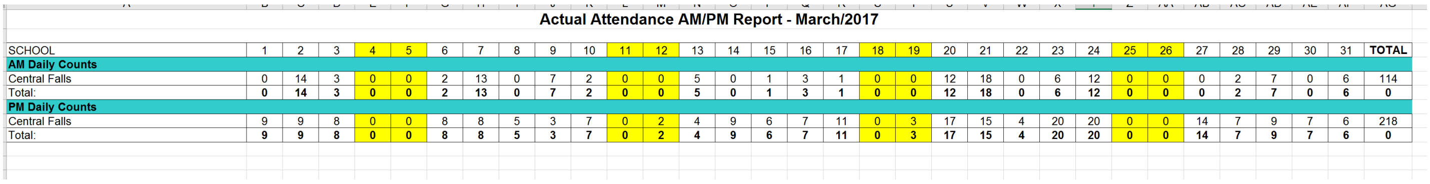
Create a monthly Excel report that displays the attendance count for one or all centers for a whole month. The AM and PM daily count is based on attendance entries. The month and year selected in From Date in search criteria is the month and year displayed in the report. If a category is selected in the search criteria, report will only display totals for that particular category.

Center: --

Category: --

From Date: 03/13/2017

Example report-



Actual Attendance AM/PM Report - March/2017

SCHOOL	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	**TOTAL**
AM Daily Counts																																
Central Falls	0	14	3	0	0	2	13	0	7	2	0	0	5	0	1	3	1	0	0	12	18	0	6	12	0	0	0	2	7	0	6	114
Total:	**0**	**14**	**3**	**0**	**0**	**2**	**13**	**0**	**7**	**2**	**0**	**0**	**5**	**0**	**1**	**3**	**1**	**0**	**0**	**12**	**18**	**0**	**6**	**12**	**0**	**0**	**0**	**2**	**7**	**0**	**6**	**0**
PM Daily Counts																																
Central Falls	9	9	8	0	0	8	8	5	3	7	0	2	4	9	6	7	11	0	3	17	15	4	20	20	0	0	14	7	9	7	6	218
Total:	**9**	**9**	**8**	**0**	**0**	**8**	**8**	**5**	**3**	**7**	**0**	**2**	**4**	**9**	**6**	**7**	**11**	**0**	**3**	**17**	**15**	**4**	**20**	**20**	**0**	**0**	**14**	**7**	**9**	**7**	**6**	**0**

Attendance- Agency Attendance Detail - Excel (Activity ID 587)

Last Modified on 05/29/2018 8:22 am EDT

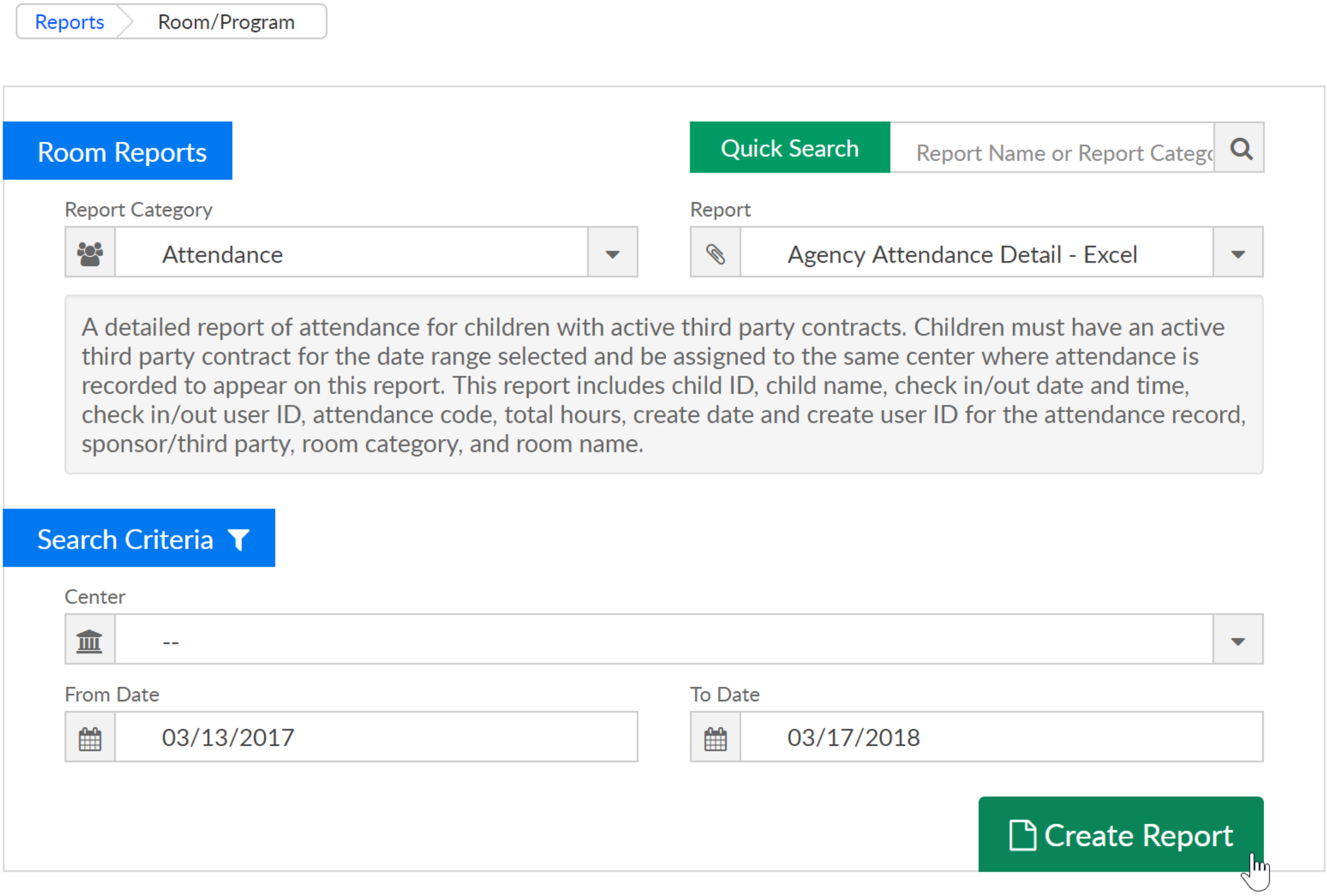
This report is useful for keeping an accurate record of agency attendance. A detailed report of attendance for children with active third party contracts.

Children must have an active third party contract for the date range selected and be assigned to the same center where attendance is recorded to appear on this report.

This report includes child ID, child name, check in/out date and time, check in/out user ID, attendance code, total hours, create date and create user ID for the attendance record, sponsor/third party, room category, and room name.

Required Fields: From Date and/or To Date.

Note: If you filter only on From Date, report will display check-ins for the entire month.



Report Category: Attendance

Report: Agency Attendance Detail - Excel

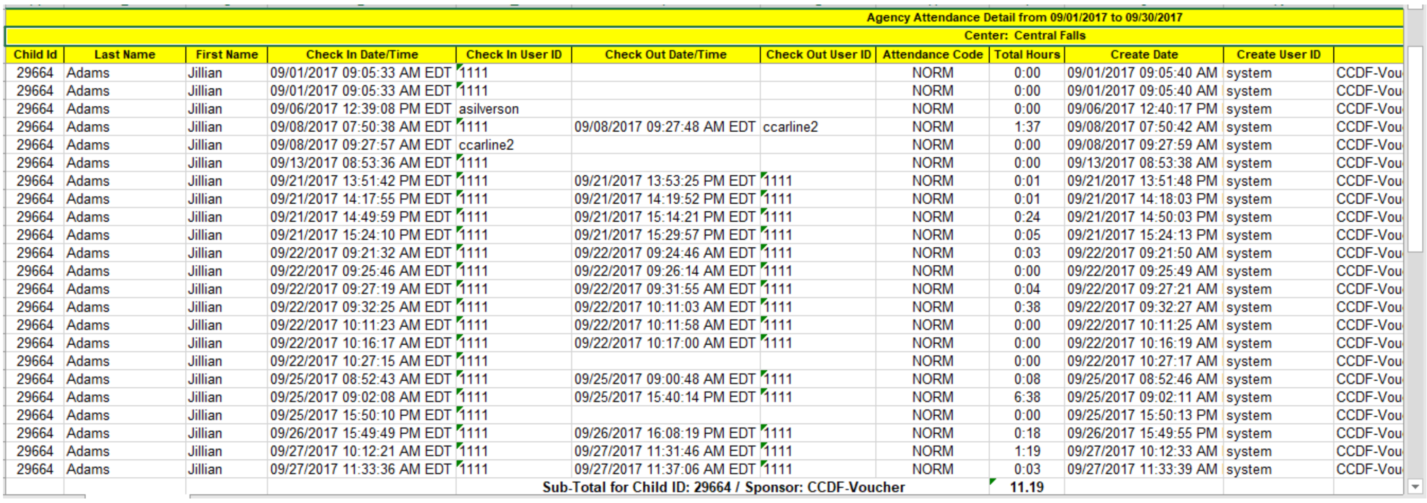
A detailed report of attendance for children with active third party contracts. Children must have an active third party contract for the date range selected and be assigned to the same center where attendance is recorded to appear on this report. This report includes child ID, child name, check in/out date and time, check in/out user ID, attendance code, total hours, create date and create user ID for the attendance record, sponsor/third party, room category, and room name.

Center: --

From Date: 03/13/2017

To Date: 03/17/2018

Example report-



Agency Attendance Detail from 09/01/2017 to 09/30/2017

Center: Central Falls

Child Id	Last Name	First Name	Check In Date/Time	Check In User ID	Check Out Date/Time	Check Out User ID	Attendance Code	Total Hours	Create Date	Create User ID	
29664	Adams	Jillian	09/01/2017 09:05:33 AM EDT	1111			NORM	0:00	09/01/2017 09:05:40 AM	system	CCDF-Vou
29664	Adams	Jillian	09/01/2017 09:05:33 AM EDT	1111			NORM	0:00	09/01/2017 09:05:40 AM	system	CCDF-Vou
29664	Adams	Jillian	09/06/2017 12:39:08 PM EDT	asilverson			NORM	0:00	09/06/2017 12:40:17 PM	system	CCDF-Vou
29664	Adams	Jillian	09/08/2017 07:50:38 AM EDT	1111	09/08/2017 09:27:48 AM EDT	ccarline2	NORM	1:37	09/08/2017 07:50:42 AM	system	CCDF-Vou
29664	Adams	Jillian	09/08/2017 09:27:57 AM EDT	ccarline2			NORM	0:00	09/08/2017 09:27:59 AM	system	CCDF-Vou
29664	Adams	Jillian	09/13/2017 08:53:36 AM EDT	1111			NORM	0:00	09/13/2017 08:53:38 AM	system	CCDF-Vou
29664	Adams	Jillian	09/21/2017 13:51:42 PM EDT	1111	09/21/2017 13:53:25 PM EDT	1111	NORM	0:01	09/21/2017 13:51:48 PM	system	CCDF-Vou
29664	Adams	Jillian	09/21/2017 14:17:55 PM EDT	1111	09/21/2017 14:19:52 PM EDT	1111	NORM	0:01	09/21/2017 14:18:03 PM	system	CCDF-Vou
29664	Adams	Jillian	09/21/2017 14:49:59 PM EDT	1111	09/21/2017 15:14:21 PM EDT	1111	NORM	0:24	09/21/2017 14:50:03 PM	system	CCDF-Vou
29664	Adams	Jillian	09/21/2017 15:24:10 PM EDT	1111	09/21/2017 15:29:57 PM EDT	1111	NORM	0:05	09/21/2017 15:24:13 PM	system	CCDF-Vou
29664	Adams	Jillian	09/22/2017 09:21:32 AM EDT	1111	09/22/2017 09:24:46 AM EDT	1111	NORM	0:03	09/22/2017 09:21:50 AM	system	CCDF-Vou
29664	Adams	Jillian	09/22/2017 09:25:46 AM EDT	1111	09/22/2017 09:26:14 AM EDT	1111	NORM	0:00	09/22/2017 09:25:49 AM	system	CCDF-Vou
29664	Adams	Jillian	09/22/2017 09:27:19 AM EDT	1111	09/22/2017 09:31:55 AM EDT	1111	NORM	0:04	09/22/2017 09:27:21 AM	system	CCDF-Vou
29664	Adams	Jillian	09/22/2017 09:32:25 AM EDT	1111	09/22/2017 10:11:03 AM EDT	1111	NORM	0:38	09/22/2017 09:32:27 AM	system	CCDF-Vou
29664	Adams	Jillian	09/22/2017 10:11:23 AM EDT	1111	09/22/2017 10:11:58 AM EDT	1111	NORM	0:00	09/22/2017 10:11:25 AM	system	CCDF-Vou
29664	Adams	Jillian	09/22/2017 10:16:17 AM EDT	1111	09/22/2017 10:17:00 AM EDT	1111	NORM	0:00	09/22/2017 10:16:19 AM	system	CCDF-Vou
29664	Adams	Jillian	09/22/2017 10:27:15 AM EDT	1111			NORM	0:00	09/22/2017 10:27:17 AM	system	CCDF-Vou
29664	Adams	Jillian	09/25/2017 08:52:43 AM EDT	1111	09/25/2017 09:00:48 AM EDT	1111	NORM	0:08	09/25/2017 08:52:46 AM	system	CCDF-Vou
29664	Adams	Jillian	09/25/2017 09:02:08 AM EDT	1111	09/25/2017 15:40:14 PM EDT	1111	NORM	6:38	09/25/2017 09:02:11 AM	system	CCDF-Vou
29664	Adams	Jillian	09/25/2017 15:50:10 PM EDT	1111			NORM	0:00	09/25/2017 15:50:13 PM	system	CCDF-Vou
29664	Adams	Jillian	09/26/2017 15:49:49 PM EDT	1111	09/26/2017 16:08:19 PM EDT	1111	NORM	0:18	09/26/2017 15:49:55 PM	system	CCDF-Vou
29664	Adams	Jillian	09/27/2017 10:12:21 AM EDT	1111	09/27/2017 11:31:46 AM EDT	1111	NORM	1:19	09/27/2017 10:12:33 AM	system	CCDF-Vou
29664	Adams	Jillian	09/27/2017 11:33:36 AM EDT	1111	09/27/2017 11:37:06 AM EDT	1111	NORM	0:03	09/27/2017 11:33:39 AM	system	CCDF-Vou
				Sub-Total for Child ID: 29664 / Sponsor: CCDF-Voucher				**11.19**			

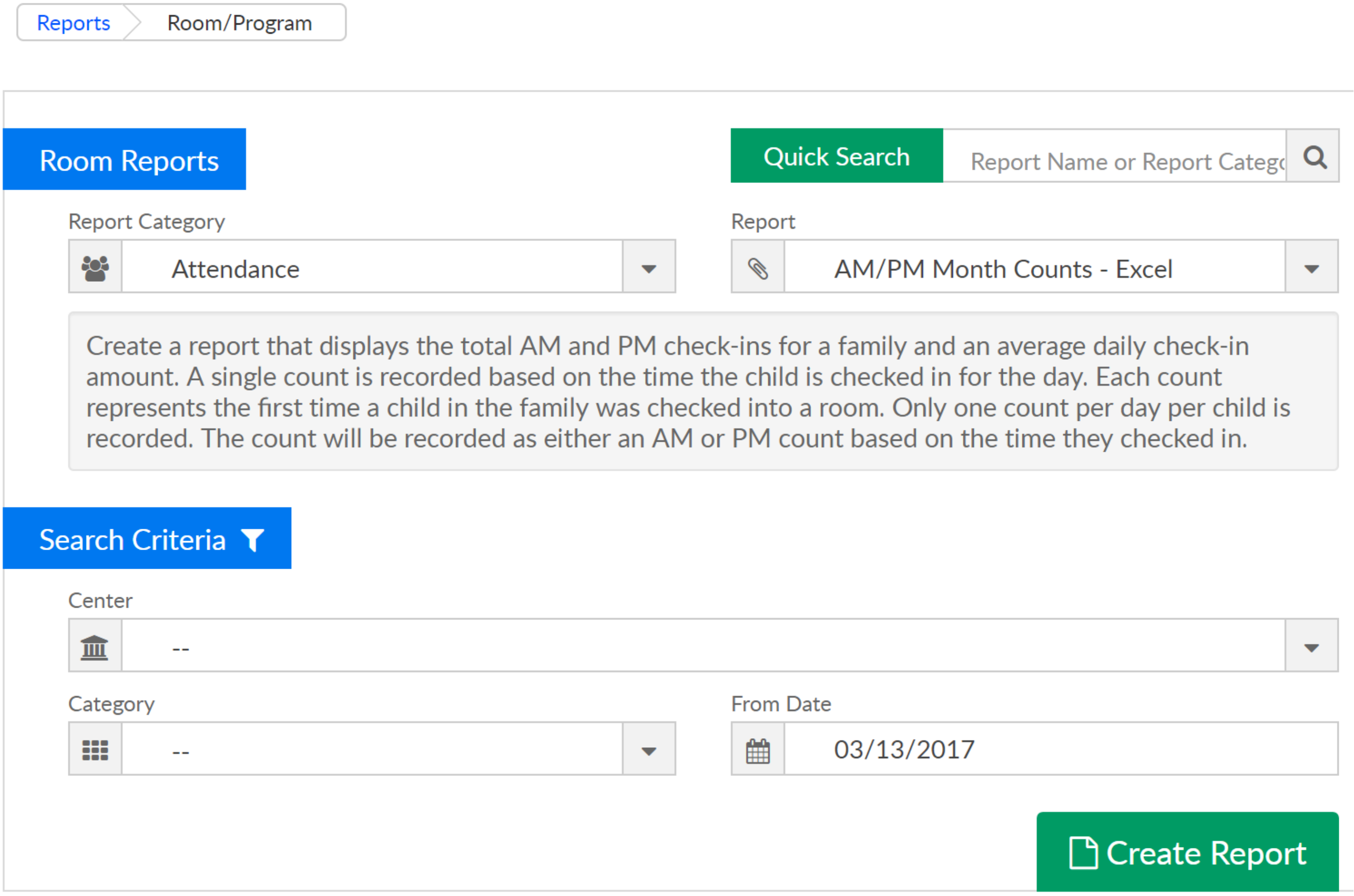
Attendance- AM-PM Month Counts - Excel (Activity ID 1217)

Last Modified on 05/29/2018 8:30 am EDT

This report displays the year-to-date AM and PM attendance counts for each family, broken down by month. You can filter on center or business level by date.

The date that is entered into the From field will pull the detail for the entire year- a month at a time.

Required Field: From Date



Report Category: Attendance

Report: AM/PM Month Counts - Excel

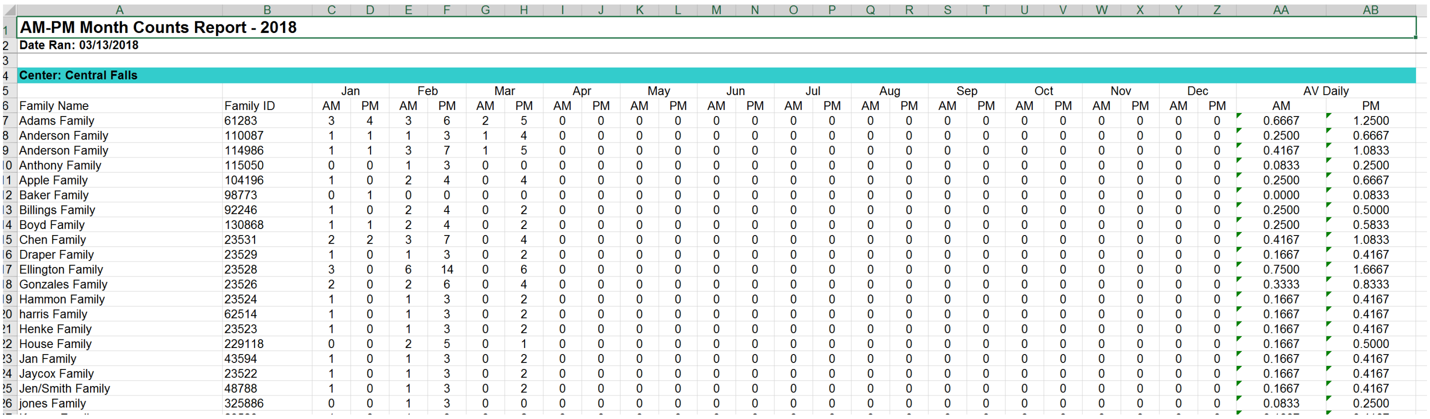
Create a report that displays the total AM and PM check-ins for a family and an average daily check-in amount. A single count is recorded based on the time the child is checked in for the day. Each count represents the first time a child in the family was checked into a room. Only one count per day per child is recorded. The count will be recorded as either an AM or PM count based on the time they checked in.

Center: --

Category: --

From Date: 03/13/2017

Example Report-



AM-PM Month Counts Report - 2018

Date Ran: 03/13/2018

Center: Central Falls

		Jan		Feb		Mar		Apr		May		Jun		Jul		Aug		Sep		Oct		Nov		Dec		AV Daily	
Family Name	Family ID	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
Adams Family	61283	3	4	3	6	2	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.6667	1.2500
Anderson Family	110087	1	1	1	3	1	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.2500	0.6667
Anderson Family	114986	1	1	3	7	1	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.4167	1.0833
Anthony Family	115050	0	0	1	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0833	0.2500
Apple Family	104196	1	0	2	4	0	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.2500	0.6667
Baker Family	98773	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0000	0.0833
Billings Family	92246	1	0	2	4	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.2500	0.5000
Boyd Family	130868	1	1	2	4	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.2500	0.5833
Chen Family	23531	2	2	3	7	0	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.4167	1.0833
Draper Family	23529	1	0	1	3	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.4167
Ellington Family	23528	3	0	6	14	0	6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.7500	1.6667
Gonzales Family	23526	2	0	2	6	0	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.3333	0.8333
Hammon Family	23524	1	0	1	3	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.4167
harris Family	62514	1	0	1	3	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.4167
Henke Family	23523	1	0	1	3	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.4167
House Family	229118	0	0	2	5	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.5000
Jan Family	43594	1	0	1	3	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.4167
Jaycox Family	23522	1	0	1	3	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.4167
Jen/Smith Family	48788	1	0	1	3	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.1667	0.4167
jones Family	325886	0	0	1	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0833	0.2500

Attendance- Arizona DES SignIn/SignOut Report - PDF (Activity ID 1630)

Last Modified on 05/29/2018 8:27 am EDT

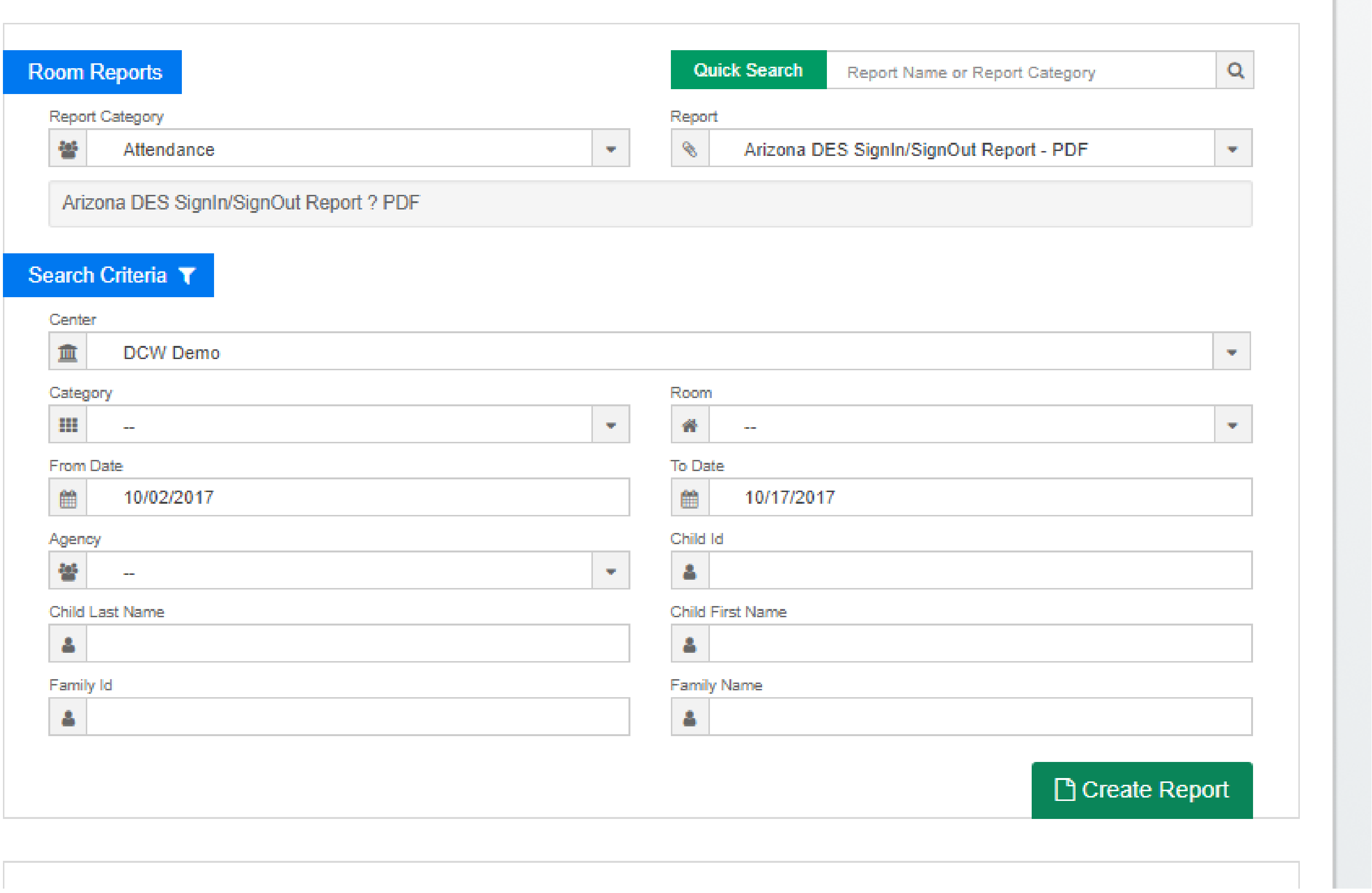
Arizona Department of Economic Security Sign-In/Sign-Out Record. Report creates one sheet per child with AM and PM check in/out times and signatures and includes unit of care calculation.

This sign-in/sign-out report meets the Arizona Department of Economic Security requirements and reflects actual child attendance. The report includes:

- Time in AM/PM
- Time out AM/PM
- Electronic signature of the parent who checked child in/out
- Number of hours the child attended per check in/out period

Report can be pulled at the business or center level.

Note: Report only displays data within calendar month, not a specific date range.. i.e. If From Date is 9/5/2017 and To Date is 10/9/17, the report will only display data for September 2017.



Report Category: Attendance

Report: Arizona DES SignIn/SignOut Report - PDF

Arizona DES SignIn/SignOut Report ? PDF

Center: DCW Demo

Category: --

Room: --

From Date: 10/02/2017

To Date: 10/17/2017

Agency: --

Child Id:

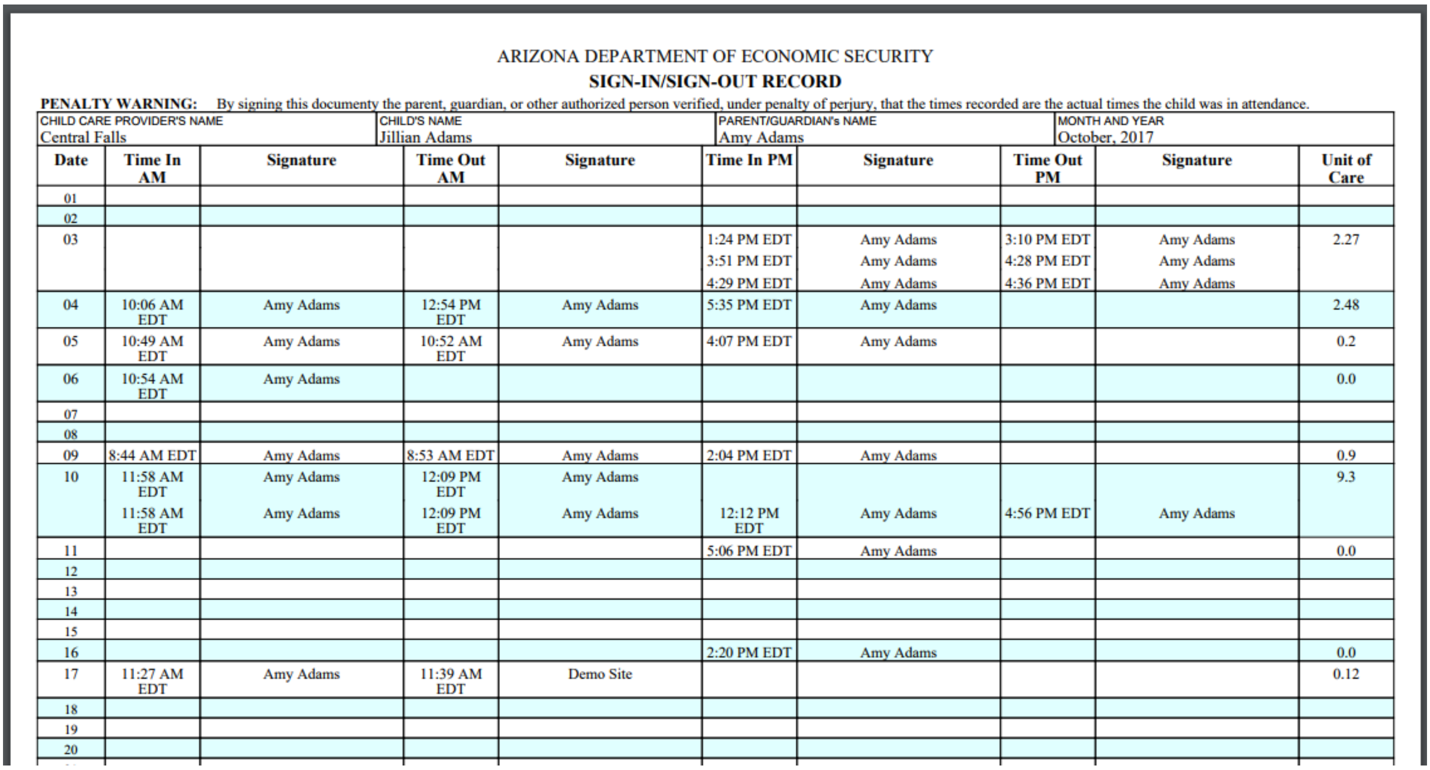
Child Last Name:

Child First Name:

Family Id:

Family Name:

Example report-



ARIZONA DEPARTMENT OF ECONOMIC SECURITY

SIGN-IN/SIGN-OUT RECORD

PENALTY WARNING: By signing this documenty the parent, guardian, or other authorized person verified, under penalty of perjury, that the times recorded are the actual times the child was in attendance.

CHILD CARE PROVIDER'S NAME	CHILD'S NAME	PARENT/GUARDIAN's NAME	MONTH AND YEAR
Central Falls	Jillian Adams	Amy Adams	October, 2017

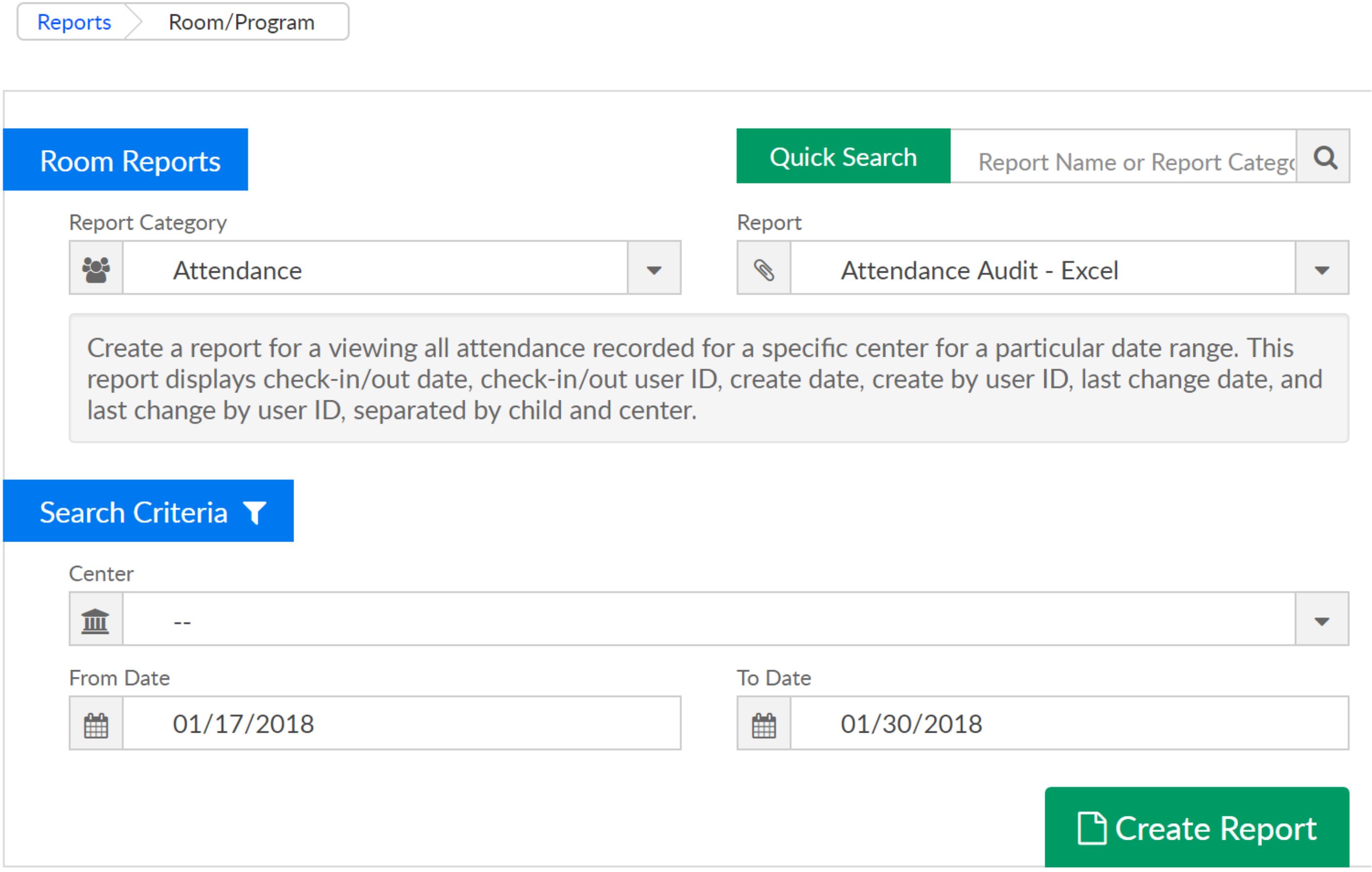
Date	Time In AM	Signature	Time Out AM	Signature	Time In PM	Signature	Time Out PM	Signature	Unit of Care
01									
02									
03					1:24 PM EDT 3:51 PM EDT 4:29 PM EDT	Amy Adams Amy Adams Amy Adams	3:10 PM EDT 4:28 PM EDT 4:36 PM EDT	Amy Adams Amy Adams Amy Adams	2.27
04	10:06 AM EDT	Amy Adams	12:54 PM EDT	Amy Adams	5:35 PM EDT	Amy Adams			2.48
05	10:49 AM EDT	Amy Adams	10:52 AM EDT	Amy Adams	4:07 PM EDT	Amy Adams			0.2
06	10:54 AM EDT	Amy Adams							0.0
07									
08									
09	8:44 AM EDT	Amy Adams	8:53 AM EDT	Amy Adams	2:04 PM EDT	Amy Adams			0.9
10	11:58 AM EDT 11:58 AM EDT	Amy Adams Amy Adams	12:09 PM EDT 12:09 PM EDT	Amy Adams Amy Adams	12:12 PM EDT	Amy Adams	4:56 PM EDT	Amy Adams	9.3
11					5:06 PM EDT	Amy Adams			0.0
12									
13									
14									
15									
16					2:20 PM EDT	Amy Adams			0.0
17	11:27 AM EDT	Amy Adams	11:39 AM EDT	Demo Site					0.12
18									
19									
20									

Attendance- Attendance Audit - Excel (Activity ID 1516)

Last Modified on 05/29/2018 8:28 am EDT

This report can be used to verify staff hours and can be used in place of employee time sheets. This report displays check-in/out date, check-in/out user ID, create date, create by user ID, last change date, and last change by user ID, separated by child and center.

Required Fields: Center and From Date



Report Category: Attendance

Report: Attendance Audit - Excel

Create a report for a viewing all attendance recorded for a specific center for a particular date range. This report displays check-in/out date, check-in/out user ID, create date, create by user ID, last change date, and last change by user ID, separated by child and center.

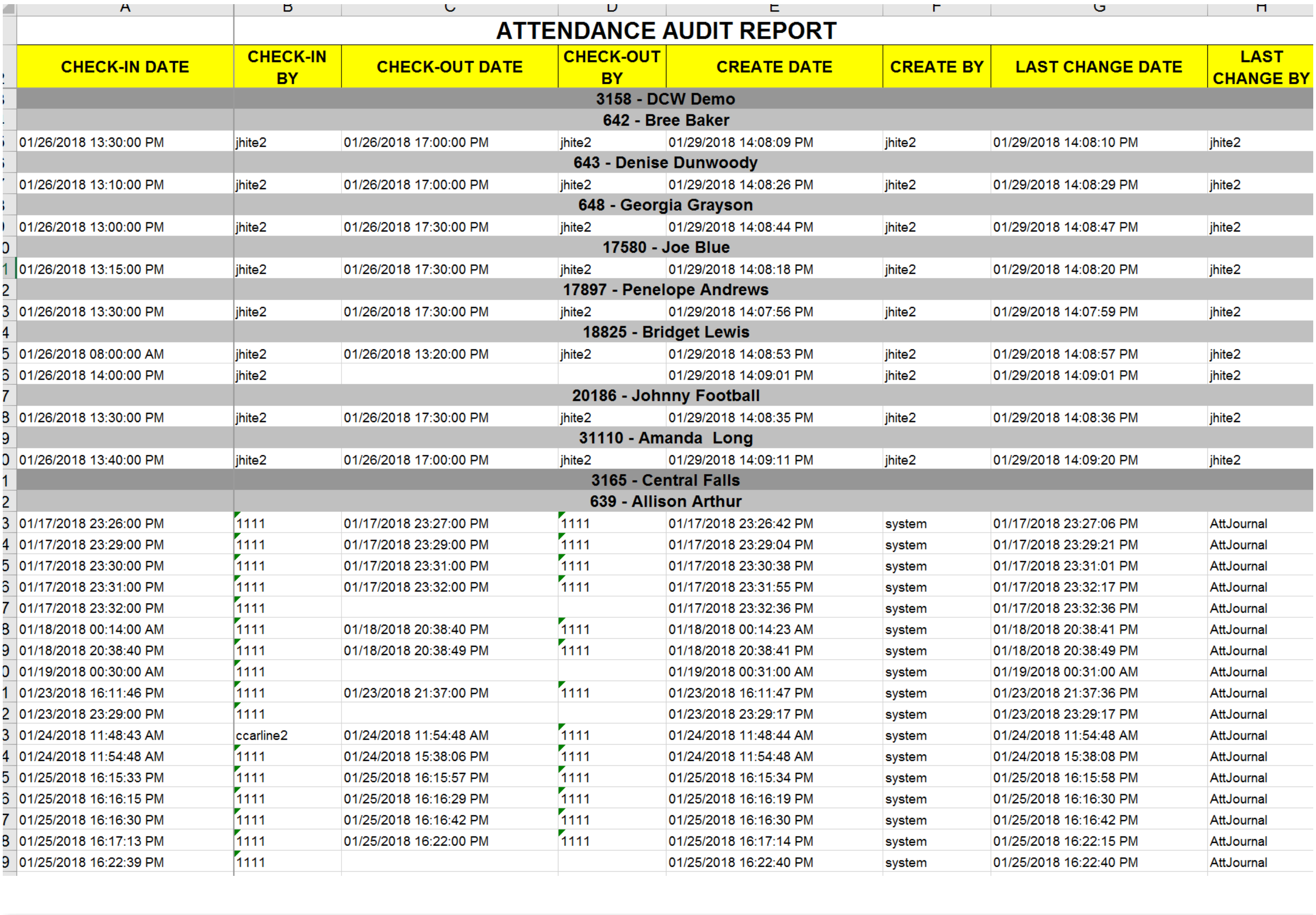
Search Criteria

Center: --

From Date: 01/17/2018

To Date: 01/30/2018

Example report-



ATTENDANCE AUDIT REPORT

CHECK-IN DATE	CHECK-IN BY	CHECK-OUT DATE	CHECK-OUT BY	CREATE DATE	CREATE BY	LAST CHANGE DATE	LAST CHANGE BY
3158 - DCW Demo							
642 - Bree Baker							
01/26/2018 13:30:00 PM	jhite2	01/26/2018 17:00:00 PM	jhite2	01/29/2018 14:08:09 PM	jhite2	01/29/2018 14:08:10 PM	jhite2
643 - Denise Dunwoody							
01/26/2018 13:10:00 PM	jhite2	01/26/2018 17:00:00 PM	jhite2	01/29/2018 14:08:26 PM	jhite2	01/29/2018 14:08:29 PM	jhite2
648 - Georgia Grayson							
01/26/2018 13:00:00 PM	jhite2	01/26/2018 17:30:00 PM	jhite2	01/29/2018 14:08:44 PM	jhite2	01/29/2018 14:08:47 PM	jhite2
17580 - Joe Blue							
01/26/2018 13:15:00 PM	jhite2	01/26/2018 17:30:00 PM	jhite2	01/29/2018 14:08:18 PM	jhite2	01/29/2018 14:08:20 PM	jhite2
17897 - Penelope Andrews							
01/26/2018 13:30:00 PM	jhite2	01/26/2018 17:30:00 PM	jhite2	01/29/2018 14:07:56 PM	jhite2	01/29/2018 14:07:59 PM	jhite2
18825 - Bridget Lewis							
01/26/2018 08:00:00 AM	jhite2	01/26/2018 13:20:00 PM	jhite2	01/29/2018 14:08:53 PM	jhite2	01/29/2018 14:08:57 PM	jhite2
01/26/2018 14:00:00 PM	jhite2			01/29/2018 14:09:01 PM	jhite2	01/29/2018 14:09:01 PM	jhite2
20186 - Johnny Football							
01/26/2018 13:30:00 PM	jhite2	01/26/2018 17:30:00 PM	jhite2	01/29/2018 14:08:35 PM	jhite2	01/29/2018 14:08:36 PM	jhite2
31110 - Amanda Long							
01/26/2018 13:40:00 PM	jhite2	01/26/2018 17:00:00 PM	jhite2	01/29/2018 14:09:11 PM	jhite2	01/29/2018 14:09:20 PM	jhite2
3165 - Central Falls							
639 - Allison Arthur							
01/17/2018 23:26:00 PM	1111	01/17/2018 23:27:00 PM	1111	01/17/2018 23:26:42 PM	system	01/17/2018 23:27:06 PM	AttJournal
01/17/2018 23:29:00 PM	1111	01/17/2018 23:29:00 PM	1111	01/17/2018 23:29:04 PM	system	01/17/2018 23:29:21 PM	AttJournal
01/17/2018 23:30:00 PM	1111	01/17/2018 23:31:00 PM	1111	01/17/2018 23:30:38 PM	system	01/17/2018 23:31:01 PM	AttJournal
01/17/2018 23:31:00 PM	1111	01/17/2018 23:32:00 PM	1111	01/17/2018 23:31:55 PM	system	01/17/2018 23:32:17 PM	AttJournal
01/17/2018 23:32:00 PM	1111			01/17/2018 23:32:36 PM	system	01/17/2018 23:32:36 PM	AttJournal
01/18/2018 00:14:00 AM	1111	01/18/2018 20:38:40 PM	1111	01/18/2018 00:14:23 AM	system	01/18/2018 20:38:41 PM	AttJournal
01/18/2018 20:38:40 PM	1111	01/18/2018 20:38:49 PM	1111	01/18/2018 20:38:41 PM	system	01/18/2018 20:38:49 PM	AttJournal
01/19/2018 00:30:00 AM	1111			01/19/2018 00:31:00 AM	system	01/19/2018 00:31:00 AM	AttJournal
01/23/2018 16:11:46 PM	1111	01/23/2018 21:37:00 PM	1111	01/23/2018 16:11:47 PM	system	01/23/2018 21:37:36 PM	AttJournal
01/23/2018 23:29:00 PM	1111			01/23/2018 23:29:17 PM	system	01/23/2018 23:29:17 PM	AttJournal
01/24/2018 11:48:43 AM	ccarline2	01/24/2018 11:54:48 AM	1111	01/24/2018 11:48:44 AM	system	01/24/2018 11:54:48 AM	AttJournal
01/24/2018 11:54:48 AM	1111	01/24/2018 15:38:06 PM	1111	01/24/2018 11:54:48 AM	system	01/24/2018 15:38:08 PM	AttJournal
01/25/2018 16:15:33 PM	1111	01/25/2018 16:15:57 PM	1111	01/25/2018 16:15:34 PM	system	01/25/2018 16:15:58 PM	AttJournal
01/25/2018 16:16:15 PM	1111	01/25/2018 16:16:29 PM	1111	01/25/2018 16:16:19 PM	system	01/25/2018 16:16:30 PM	AttJournal
01/25/2018 16:16:30 PM	1111	01/25/2018 16:16:42 PM	1111	01/25/2018 16:16:30 PM	system	01/25/2018 16:16:42 PM	AttJournal
01/25/2018 16:17:13 PM	1111	01/25/2018 16:22:00 PM	1111	01/25/2018 16:17:14 PM	system	01/25/2018 16:22:15 PM	AttJournal
01/25/2018 16:22:39 PM	1111			01/25/2018 16:22:40 PM	system	01/25/2018 16:22:40 PM	AttJournal

Attendance- Attendance Log - PDF (Activity ID 601)

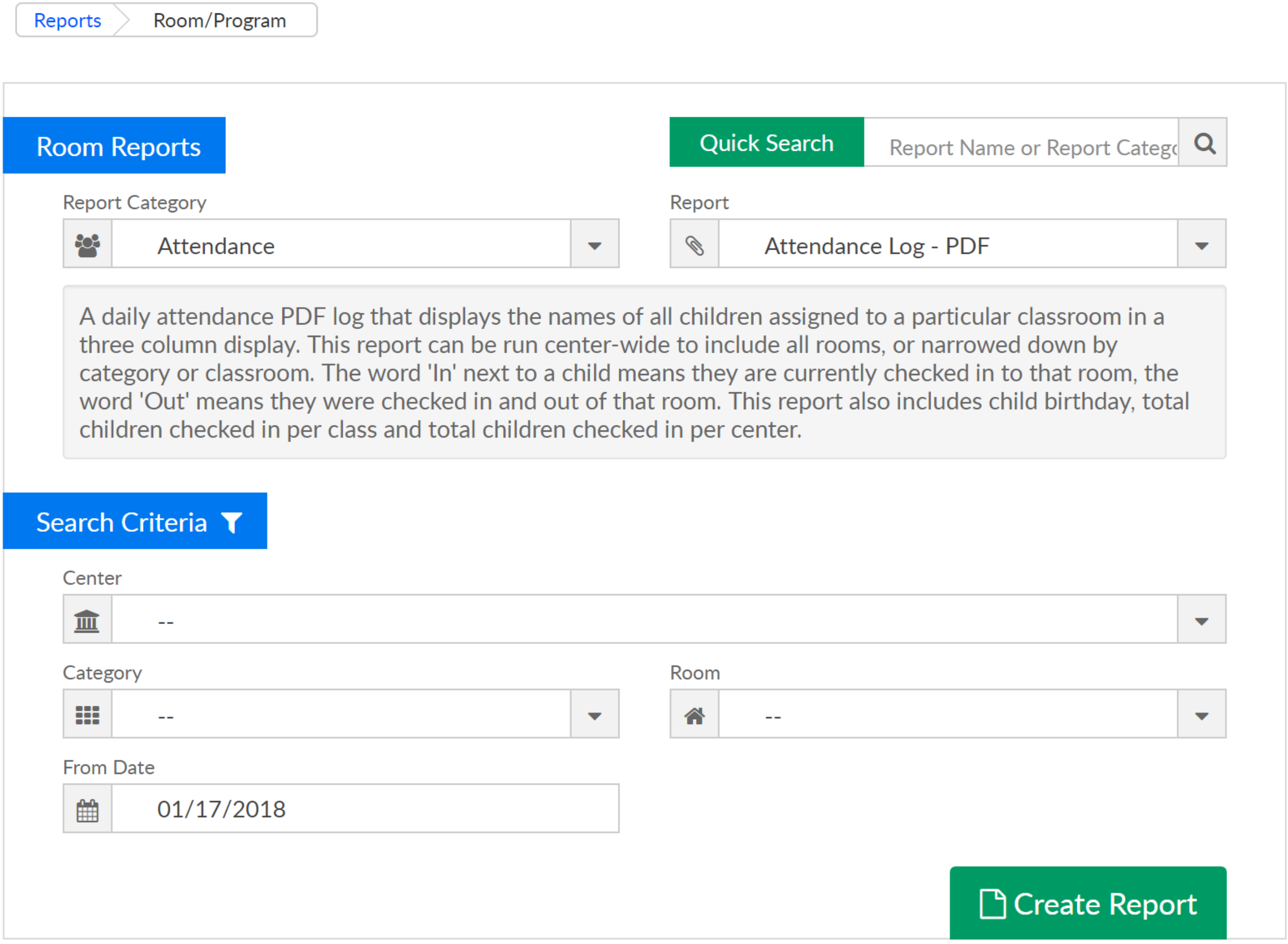
Last Modified on 05/29/2018 8:29 am EDT

A daily attendance PDF log that displays the names of all children assigned to a particular classroom in a three column display. This report can be run center-wide to include all rooms, or narrowed down by category or classroom.

The word 'In' next to a child means they are currently checked in to that room, the word 'Out' means they were checked in and out of that room.

This report also includes child birthday, total children checked in per class and total children checked in per center.

Required fields: From Date.



Report Category: Attendance

Report: Attendance Log - PDF

A daily attendance PDF log that displays the names of all children assigned to a particular classroom in a three column display. This report can be run center-wide to include all rooms, or narrowed down by category or classroom. The word 'In' next to a child means they are currently checked in to that room, the word 'Out' means they were checked in and out of that room. This report also includes child birthday, total children checked in per class and total children checked in per center.

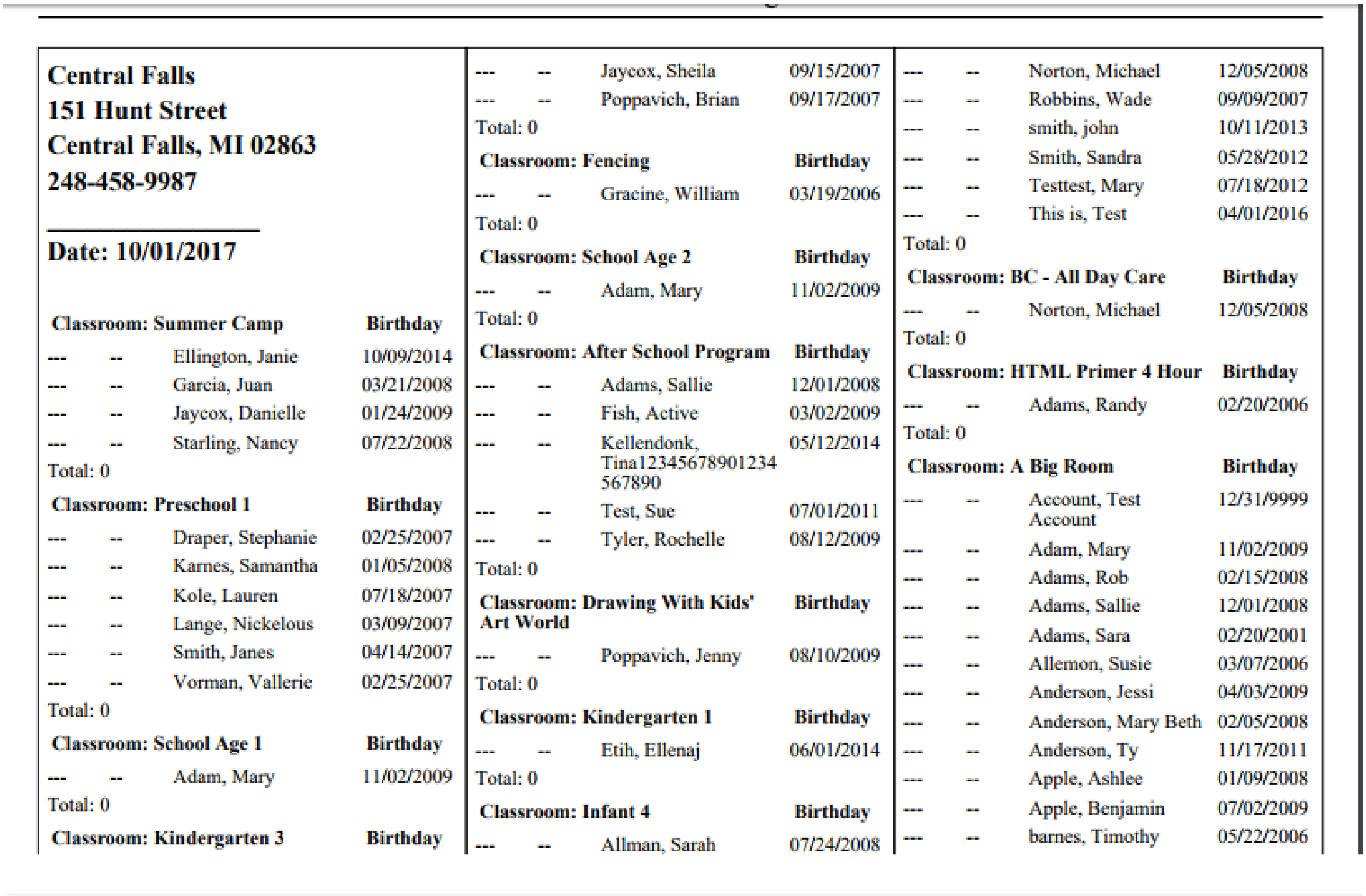
Center: --

Category: --

Room: --

From Date: 01/17/2018

Example report-



Central Falls
151 Hunt Street
Central Falls, MI 02863
248-458-9987

Date: 10/01/2017

Classroom: Summer Camp			**Birthday**
---	--	Ellington, Janie	10/09/2014
---	--	Garcia, Juan	03/21/2008
---	--	Jaycox, Danielle	01/24/2009
---	--	Starling, Nancy	07/22/2008

Total: 0

Classroom: Preschool 1			**Birthday**
---	--	Draper, Stephanie	02/25/2007
---	--	Karnes, Samantha	01/05/2008
---	--	Kole, Lauren	07/18/2007
---	--	Lange, Nickelous	03/09/2007
---	--	Smith, Janes	04/14/2007
---	--	Vorman, Vallerie	02/25/2007

Total: 0

Classroom: School Age 1			**Birthday**
---	--	Adam, Mary	11/02/2009

Total: 0

Classroom: Kindergarten 3			**Birthday**
---	--	Jaycox, Sheila	09/15/2007
---	--	Poppavich, Brian	09/17/2007

Total: 0

Classroom: Fencing			**Birthday**
---	--	Gracine, William	03/19/2006

Total: 0

Classroom: School Age 2			**Birthday**
---	--	Adam, Mary	11/02/2009

Total: 0

Classroom: After School Program			**Birthday**
---	--	Adams, Sallie	12/01/2008
---	--	Fish, Active	03/02/2009
---	--	Kellendonk, Tina12345678901234567890	05/12/2014
---	--	Test, Sue	07/01/2011
---	--	Tyler, Rochelle	08/12/2009

Total: 0

Classroom: Drawing With Kids' Art World			**Birthday**
---	--	Poppavich, Jenny	08/10/2009

Total: 0

Classroom: Kindergarten 1			**Birthday**
---	--	Etih, Ellenaj	06/01/2014

Total: 0

Classroom: Infant 4			**Birthday**
---	--	Allman, Sarah	07/24/2008
---	--	Norton, Michael	12/05/2008
---	--	Robbins, Wade	09/09/2007
---	--	smith, john	10/11/2013
---	--	Smith, Sandra	05/28/2012
---	--	Testtest, Mary	07/18/2012
---	--	This is, Test	04/01/2016

Total: 0

Classroom: BC - All Day Care			**Birthday**
---	--	Norton, Michael	12/05/2008

Total: 0

Classroom: HTML Primer 4 Hour			**Birthday**
---	--	Adams, Randy	02/20/2006

Total: 0

Classroom: A Big Room			**Birthday**
---	--	Account, Test Account	12/31/9999
---	--	Adam, Mary	11/02/2009
---	--	Adams, Rob	02/15/2008
---	--	Adams, Sallie	12/01/2008
---	--	Adams, Sara	02/20/2001
---	--	Allemon, Susie	03/07/2006
---	--	Anderson, Jessi	04/03/2009
---	--	Anderson, Mary Beth	02/05/2008
---	--	Anderson, Ty	11/17/2011
---	--	Apple, Ashlee	01/09/2008
---	--	Apple, Benjamin	07/02/2009
---	--	barnes, Timothy	05/22/2006

Attendance- Attendance Statistics Summary - Excel (Activity ID 543)

Last Modified on 05/29/2018 8:36 am EDT

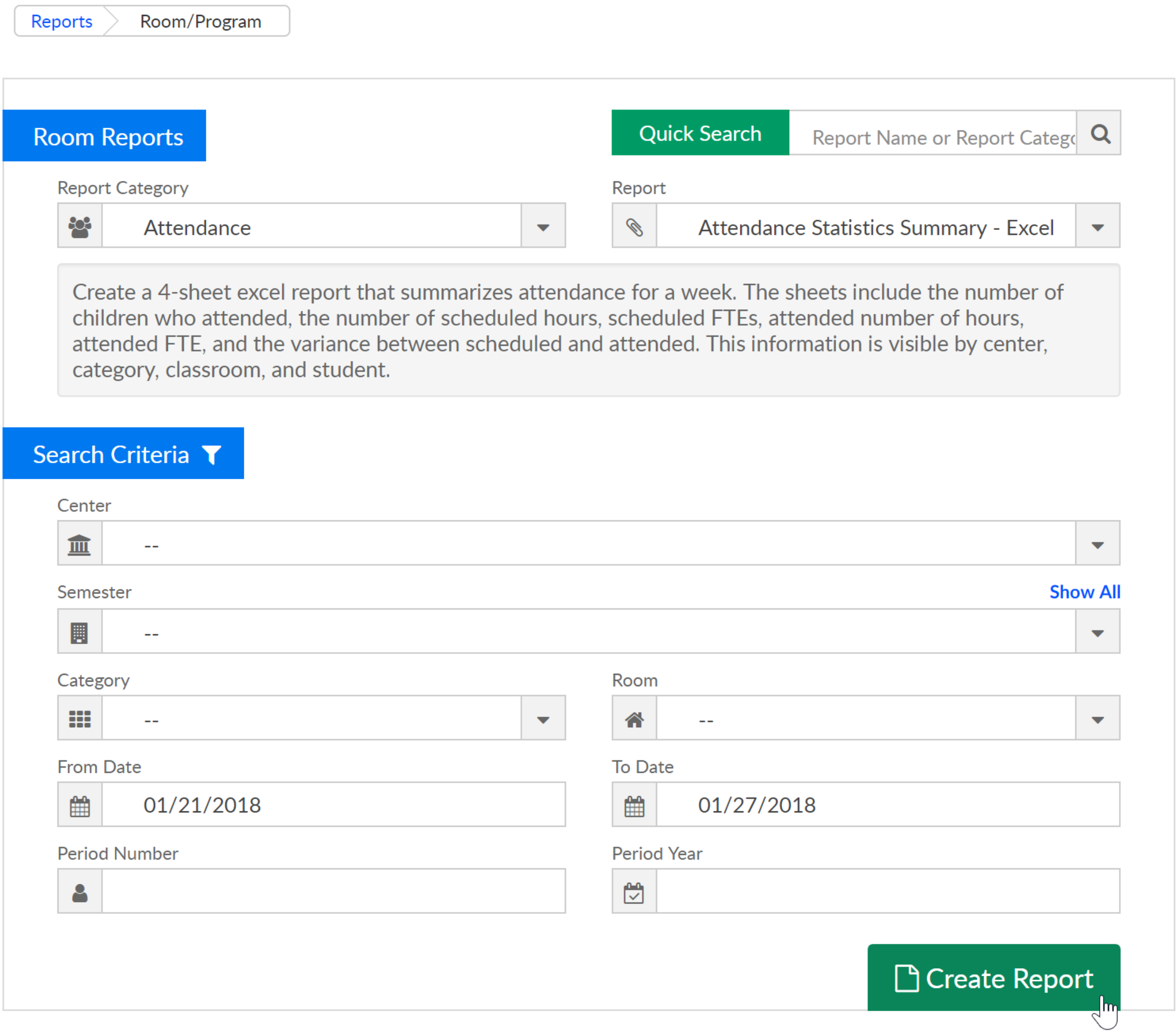
This report is used to keep an accurate record of attendance and accounts for variations in scheduled versus actual attendance for billing purposes.

The sheets include the number of children who attended, the number of scheduled hours, scheduled FTEs, attended number of hours, attended FTE, and the variance between scheduled and attended.

This information is visible by center, category, classroom, and student.

This Excel workbook displays a summary of attendance statistics by Center, Category, and Classroom.

Required fields: From Date and To Date, if no center is selected detail will be pulled for the entire business and it's centers.



Report Category: Attendance

Report: Attendance Statistics Summary - Excel

Create a 4-sheet excel report that summarizes attendance for a week. The sheets include the number of children who attended, the number of scheduled hours, scheduled FTEs, attended number of hours, attended FTE, and the variance between scheduled and attended. This information is visible by center, category, classroom, and student.

Center: --

Semester: --

Category: --

Room: --

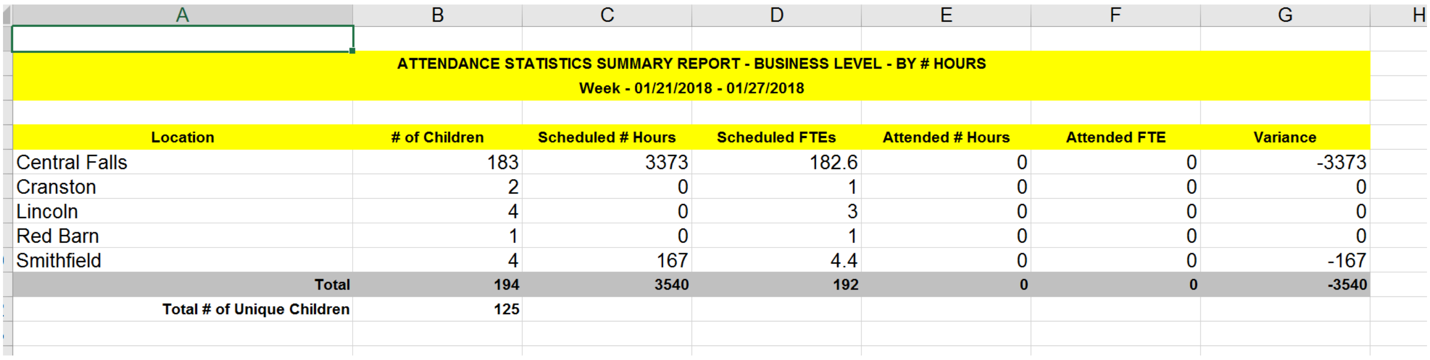
From Date: 01/21/2018

To Date: 01/27/2018

Period Number:

Period Year:

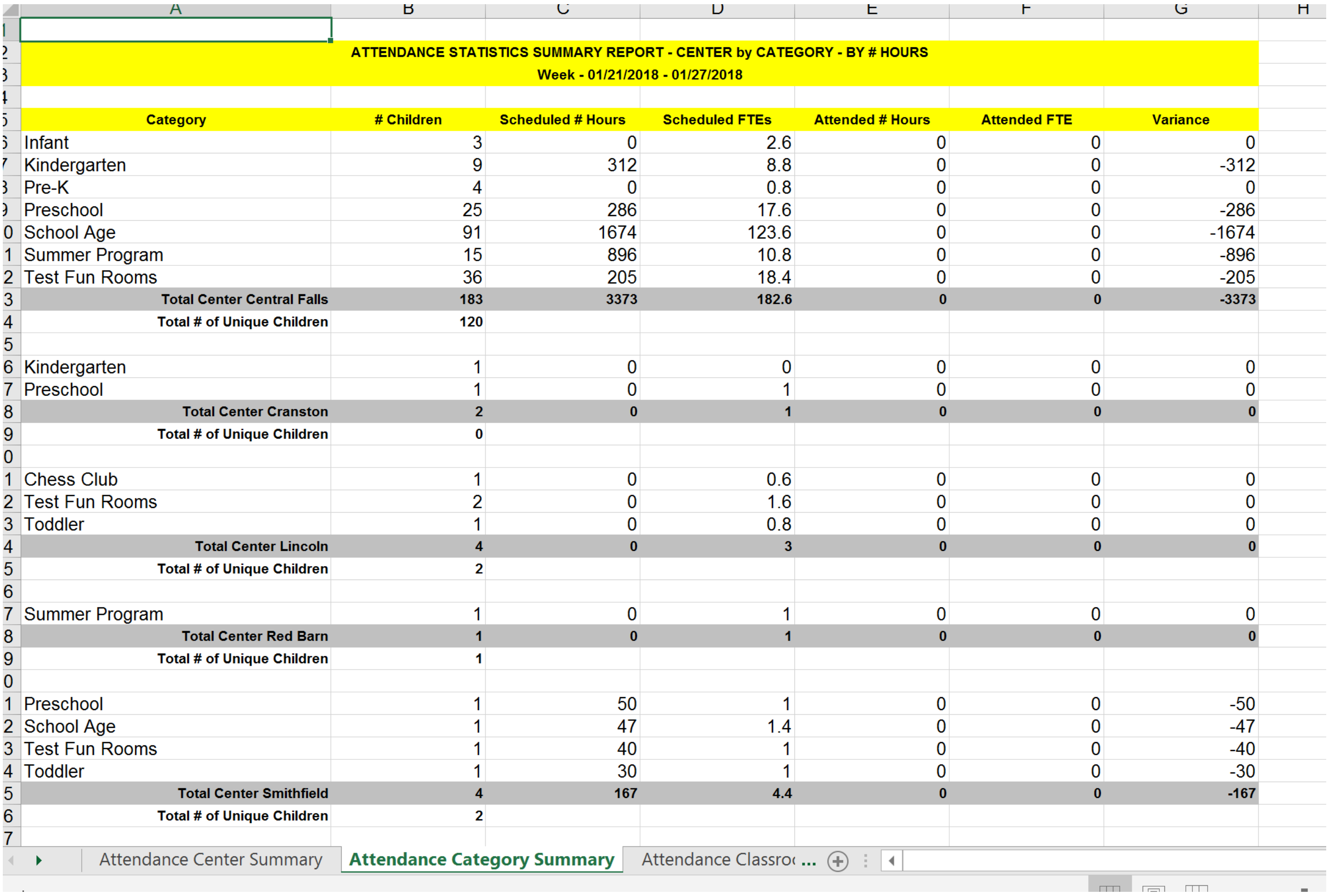
Attendance Center Summary- the tab displays # of children in the center, scheduled # of hours, scheduled FTEs, Attended # Hours, Attended FTE and Variance



ATTENDANCE STATISTICS SUMMARY REPORT - BUSINESS LEVEL - BY # HOURS
Week - 01/21/2018 - 01/27/2018

Location	# of Children	Scheduled # Hours	Scheduled FTEs	Attended # Hours	Attended FTE	Variance
Central Falls	183	3373	182.6	0	0	-3373
Cranston	2	0	1	0	0	0
Lincoln	4	0	3	0	0	0
Red Barn	1	0	1	0	0	0
Smithfield	4	167	4.4	0	0	-167
Total	**194**	**3540**	**192**	**0**	**0**	**-3540**
Total # of Unique Children	**125**					

Attendance Category Summary- this tab displays the same detail by category within a center

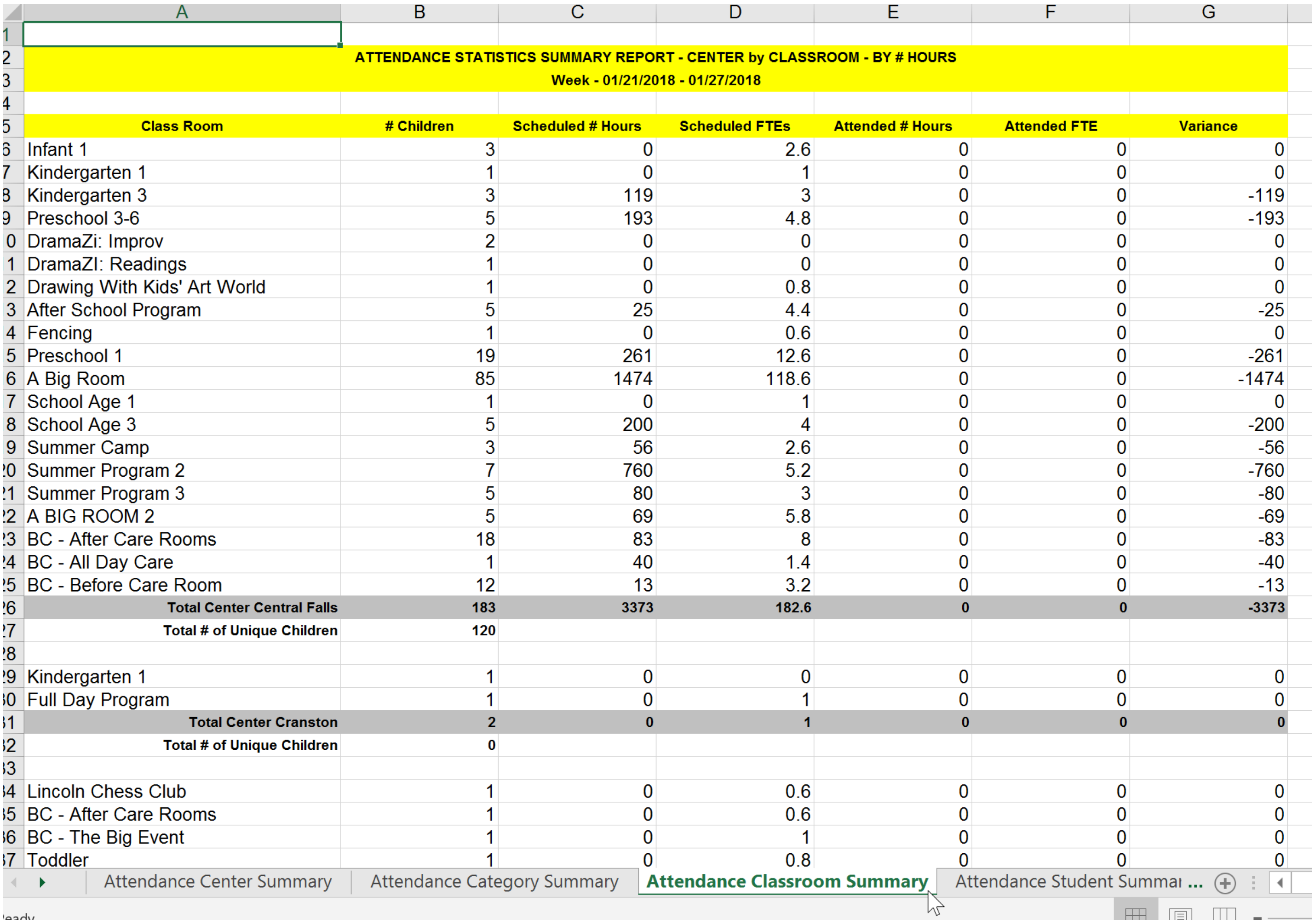


ATTENDANCE STATISTICS SUMMARY REPORT - CENTER by CATEGORY - BY # HOURS

Week - 01/21/2018 - 01/27/2018

Category	# Children	Scheduled # Hours	Scheduled FTEs	Attended # Hours	Attended FTE	Variance
Infant	3	0	2.6	0	0	0
Kindergarten	9	312	8.8	0	0	-312
Pre-K	4	0	0.8	0	0	0
Preschool	25	286	17.6	0	0	-286
School Age	91	1674	123.6	0	0	-1674
Summer Program	15	896	10.8	0	0	-896
Test Fun Rooms	36	205	18.4	0	0	-205
Total Center Central Falls	**183**	**3373**	**182.6**	**0**	**0**	**-3373**
Total # of Unique Children	**120**					
Kindergarten	1	0	0	0	0	0
Preschool	1	0	1	0	0	0
Total Center Cranston	**2**	**0**	**1**	**0**	**0**	**0**
Total # of Unique Children	**0**					
Chess Club	1	0	0.6	0	0	0
Test Fun Rooms	2	0	1.6	0	0	0
Toddler	1	0	0.8	0	0	0
Total Center Lincoln	**4**	**0**	**3**	**0**	**0**	**0**
Total # of Unique Children	**2**					
Summer Program	1	0	1	0	0	0
Total Center Red Barn	**1**	**0**	**1**	**0**	**0**	**0**
Total # of Unique Children	**1**					
Preschool	1	50	1	0	0	-50
School Age	1	47	1.4	0	0	-47
Test Fun Rooms	1	40	1	0	0	-40
Toddler	1	30	1	0	0	-30
Total Center Smithfield	**4**	**167**	**4.4**	**0**	**0**	**-167**
Total # of Unique Children	**2**					

Attendance Classroom Summary- this tab displays scheduled and attended information by specific room within a site-

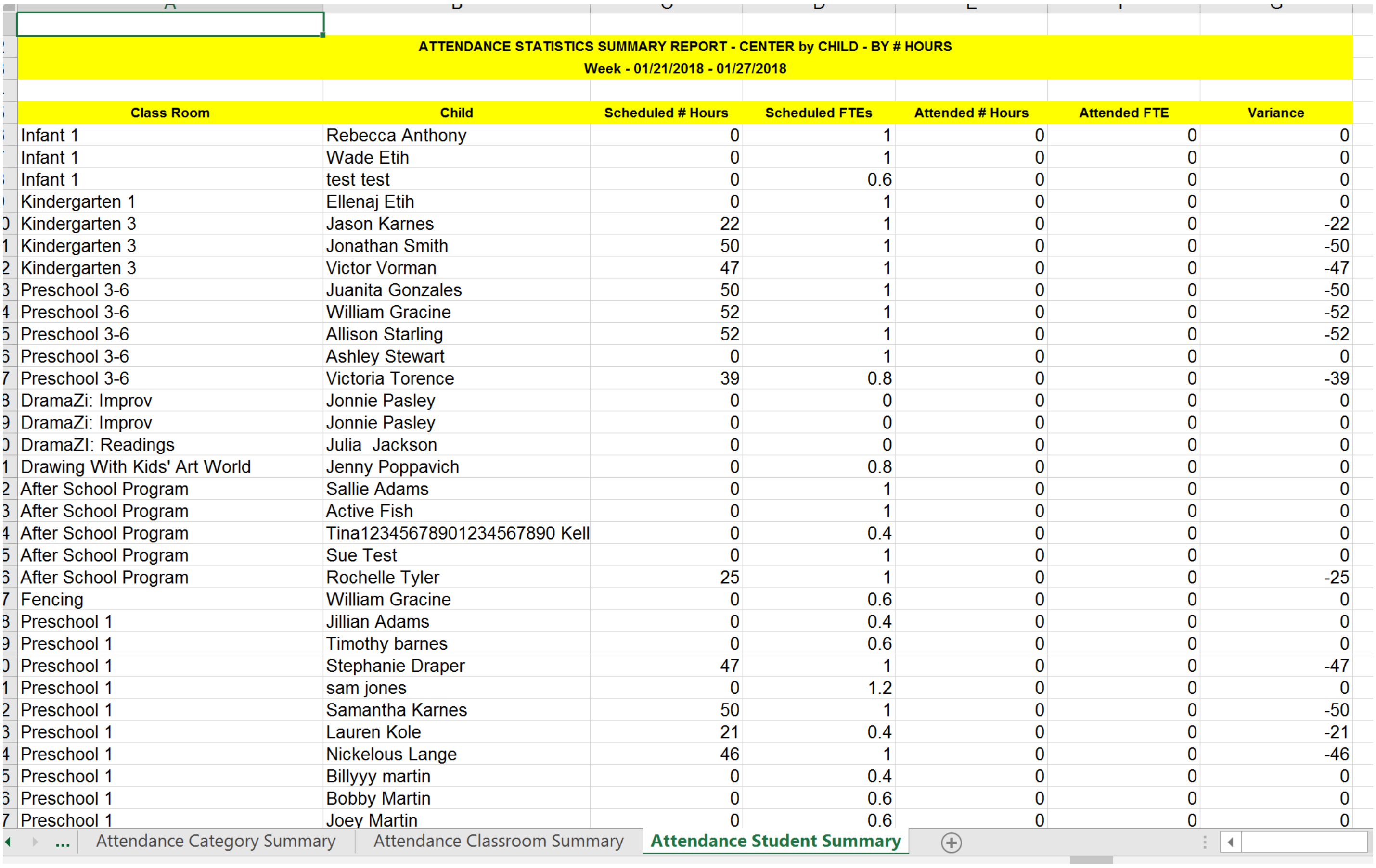


ATTENDANCE STATISTICS SUMMARY REPORT - CENTER by CLASSROOM - BY # HOURS

Week - 01/21/2018 - 01/27/2018

Class Room	# Children	Scheduled # Hours	Scheduled FTEs	Attended # Hours	Attended FTE	Variance
Infant 1	3	0	2.6	0	0	0
Kindergarten 1	1	0	1	0	0	0
Kindergarten 3	3	119	3	0	0	-119
Preschool 3-6	5	193	4.8	0	0	-193
DramaZi: Improv	2	0	0	0	0	0
DramaZI: Readings	1	0	0	0	0	0
Drawing With Kids' Art World	1	0	0.8	0	0	0
After School Program	5	25	4.4	0	0	-25
Fencing	1	0	0.6	0	0	0
Preschool 1	19	261	12.6	0	0	-261
A Big Room	85	1474	118.6	0	0	-1474
School Age 1	1	0	1	0	0	0
School Age 3	5	200	4	0	0	-200
Summer Camp	3	56	2.6	0	0	-56
Summer Program 2	7	760	5.2	0	0	-760
Summer Program 3	5	80	3	0	0	-80
A BIG ROOM 2	5	69	5.8	0	0	-69
BC - After Care Rooms	18	83	8	0	0	-83
BC - All Day Care	1	40	1.4	0	0	-40
BC - Before Care Room	12	13	3.2	0	0	-13
Total Center Central Falls	**183**	**3373**	**182.6**	**0**	**0**	**-3373**
Total # of Unique Children	**120**					
Kindergarten 1	1	0	0	0	0	0
Full Day Program	1	0	1	0	0	0
Total Center Cranston	**2**	**0**	**1**	**0**	**0**	**0**
Total # of Unique Children	**0**					
Lincoln Chess Club	1	0	0.6	0	0	0
BC - After Care Rooms	1	0	0.6	0	0	0
BC - The Big Event	1	0	1	0	0	0
Toddler	1	0	0.8	0	0	0

Attendance Student Summary- this tab displays scheduled and attended information by child program/room assignment for the date range.



ATTENDANCE STATISTICS SUMMARY REPORT - CENTER by CHILD - BY # HOURS

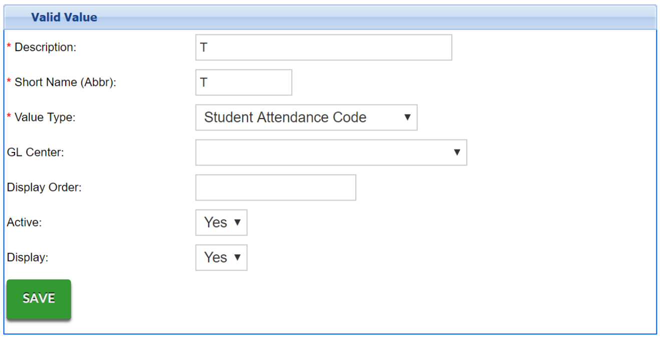
Week - 01/21/2018 - 01/27/2018

Class Room	Child	Scheduled # Hours	Scheduled FTEs	Attended # Hours	Attended FTE	Variance
Infant 1	Rebecca Anthony	0	1	0	0	0
Infant 1	Wade Etih	0	1	0	0	0
Infant 1	test test	0	0.6	0	0	0
Kindergarten 1	Ellenaj Etih	0	1	0	0	0
Kindergarten 3	Jason Karnes	22	1	0	0	-22
Kindergarten 3	Jonathan Smith	50	1	0	0	-50
Kindergarten 3	Victor Vorman	47	1	0	0	-47
Preschool 3-6	Juanita Gonzales	50	1	0	0	-50
Preschool 3-6	William Gracine	52	1	0	0	-52
Preschool 3-6	Allison Starling	52	1	0	0	-52
Preschool 3-6	Ashley Stewart	0	1	0	0	0
Preschool 3-6	Victoria Torence	39	0.8	0	0	-39
DramaZi: Improv	Jonnie Pasley	0	0	0	0	0
DramaZi: Improv	Jonnie Pasley	0	0	0	0	0
DramaZI: Readings	Julia Jackson	0	0	0	0	0
Drawing With Kids' Art World	Jenny Poppavich	0	0.8	0	0	0
After School Program	Sallie Adams	0	1	0	0	0
After School Program	Active Fish	0	1	0	0	0
After School Program	Tina12345678901234567890 Kell	0	0.4	0	0	0
After School Program	Sue Test	0	1	0	0	0
After School Program	Rochelle Tyler	25	1	0	0	-25
Fencing	William Gracine	0	0.6	0	0	0
Preschool 1	Jillian Adams	0	0.4	0	0	0
Preschool 1	Timothy barnes	0	0.6	0	0	0
Preschool 1	Stephanie Draper	47	1	0	0	-47
Preschool 1	sam jones	0	1.2	0	0	0
Preschool 1	Samantha Karnes	50	1	0	0	-50
Preschool 1	Lauren Kole	21	0.4	0	0	-21
Preschool 1	Nickelous Lange	46	1	0	0	-46
Preschool 1	Billyyy martin	0	0.4	0	0	0
Preschool 1	Bobby Martin	0	0.6	0	0	0
Preschool 1	Joey Martin	0	0.6	0	0	0

Attendance- Attendance Termination - Excel (Activity ID 967)

Last Modified on 05/29/2018 8:36 am EDT

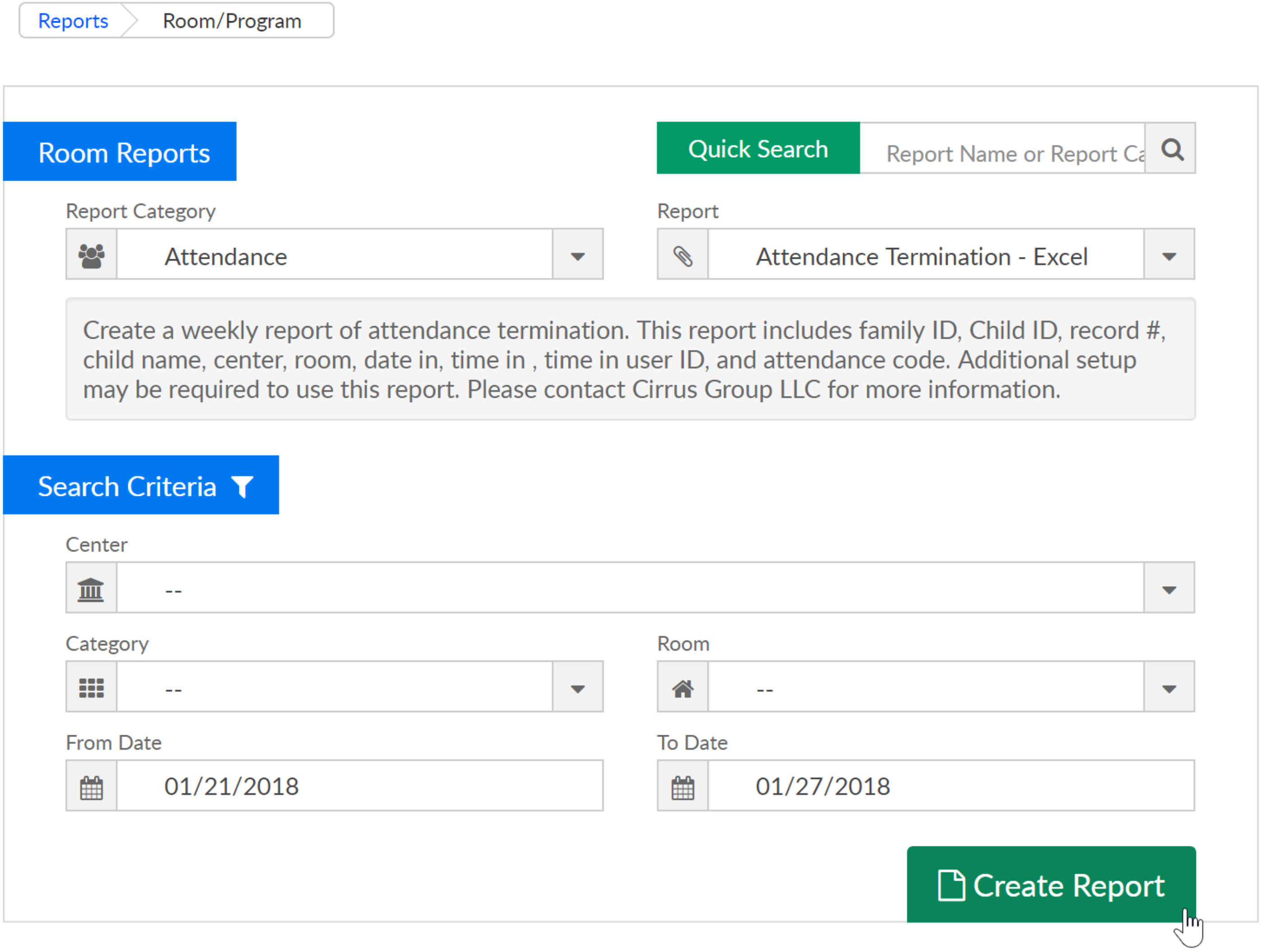
A weekly report of attendance termination. A report that displays children who have been assigned the attendance code of T for termination. The Student Attendance Code Valid Value of T must be setup to generate this report (this would need to be setup as a student attendance code type valid value).


Valid Value

* Description:	T
* Short Name (Abbr):	T
* Value Type:	Student Attendance Code
GL Center:	
Display Order:	
Active:	Yes
Display:	Yes

This report includes family ID, Child ID, record #, child name, center, room, date in, time in, time in user ID, and attendance code.

- Date Range: The date range the report was created for.
- Family ID: The DCW identification number assigned to the family.
- Child ID: The DCW identification number assigned to the child.
- Record #: The record number assigned to the child on the child's Admission tab.
- First Name: The first name of the child.
- Last Name: The last name of the child.
- Center: The name of the center the child was checked into.
- Room: The name of the classroom the child was checked into.
- Date In: The date the child was checked into the classroom.
- Time In: The time the child was checked into the classroom.
- Time In User ID: The name of the user that checked the child into the classroom.
- Attendance Code: The attendance code assigned to the child's classroom assignment. The attendance code will always be T.



Report Category: Attendance

Report: Attendance Termination - Excel

Create a weekly report of attendance termination. This report includes family ID, Child ID, record #, child name, center, room, date in, time in , time in user ID, and attendance code. Additional setup may be required to use this report. Please contact Cirrus Group LLC for more information.

Center: --

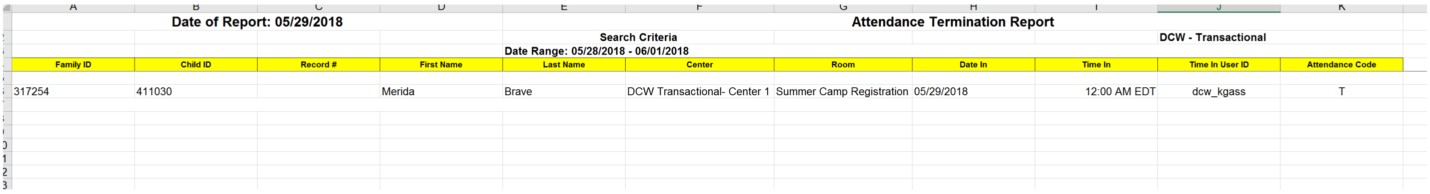
Category: --

Room: --

From Date: 01/21/2018

To Date: 01/27/2018

Example report-



Date of Report: 05/29/2018

Attendance Termination Report

Search Criteria

DCW - Transactional

Date Range: 05/28/2018 - 06/01/2018

Family ID	Child ID	Record #	First Name	Last Name	Center	Room	Date In	Time In	Time In User ID	Attendance Code
317254	411030		Merida	Brave	DCW Transactional- Center 1	Summer Camp Registration	05/29/2018	12:00 AM EDT	dcw_kgass	T

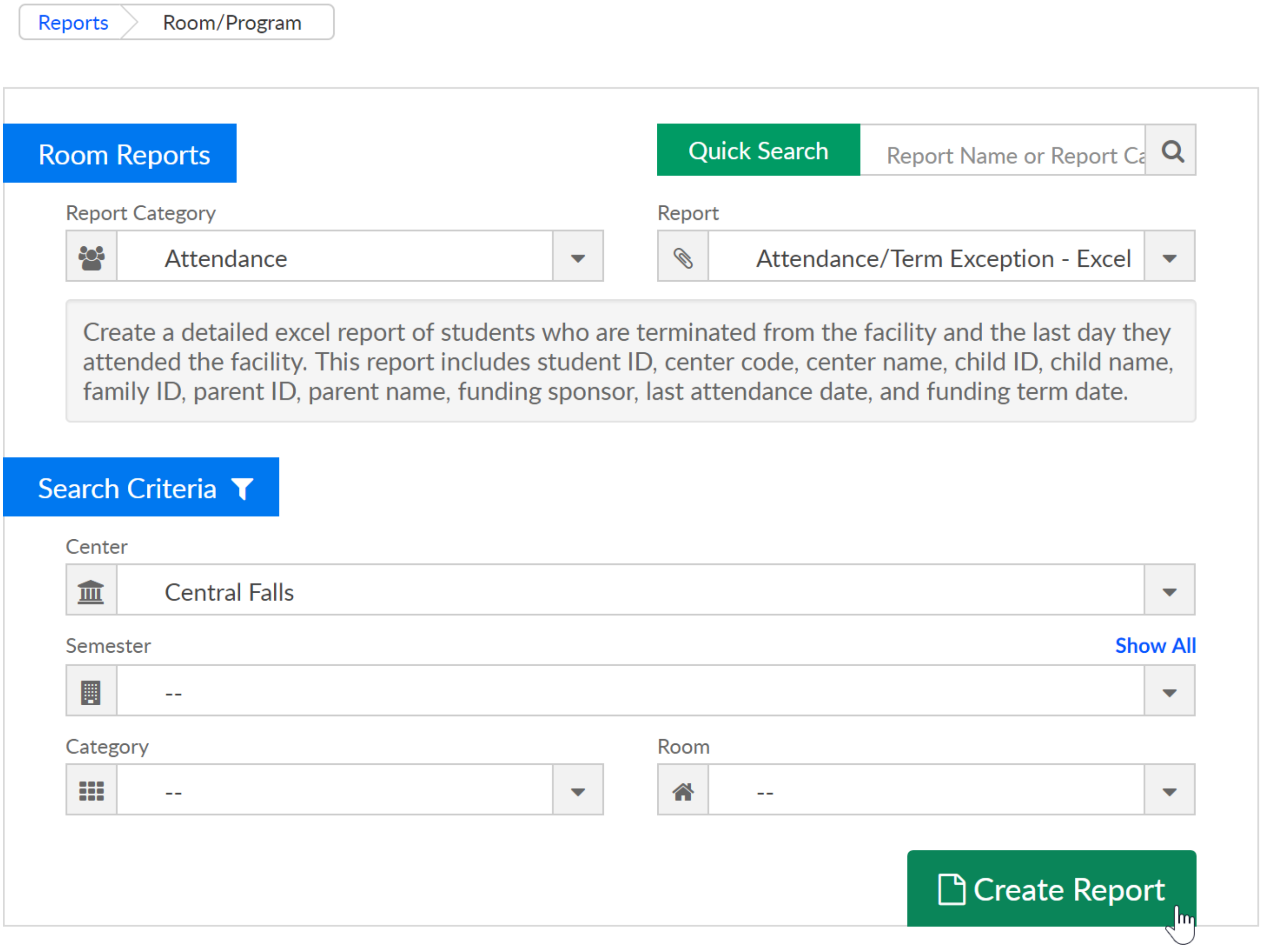
Attendance- Attendance/Term Exception - Excel (Activity ID 516)

Last Modified on 05/29/2018 8:37 am EDT

A detailed excel report of students who are terminated from the facility and the last day they attended the facility.

This report includes student ID, center code, center name, child ID, child name, family ID, parent ID, parent name, funding sponsor, last attendance date, and funding term date.

- Student ID: The identification number assigned by the facility for the child.
- Center Code: The identification assigned to the facility within the Platform.
- Center Name: The name of the facility the child is enrolled within.
- Child ID: The identification number created by the Platform for the child.
- Child First Name: The first name of the child within the Platform.
- Child Last Name: The last name of the child within the Platform.
- Family ID: The identification number assigned to the family within the Platform.
- Parent ID: The identification number assigned to the parent within the Platform.
- Parent First Name: The first name of the child's parent.
- Parent Last Name: The last name of the child's parent.
- Funding: The name of the funding sponsor assigned to the child.
- Last Attendance Date: The date the child last attended the facility.
- Funding Term Date: The last date the funding sponsor is assigned to pay the child's attendance to the facility.



Report Category: Attendance

Report: Attendance/Term Exception - Excel

Create a detailed excel report of students who are terminated from the facility and the last day they attended the facility. This report includes student ID, center code, center name, child ID, child name, family ID, parent ID, parent name, funding sponsor, last attendance date, and funding term date.

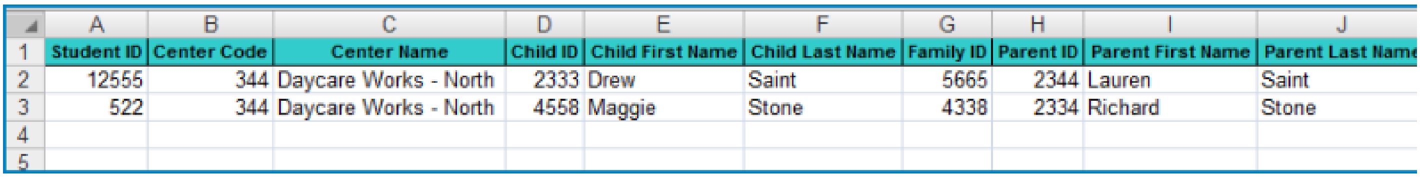
Center: Central Falls

Semester: --

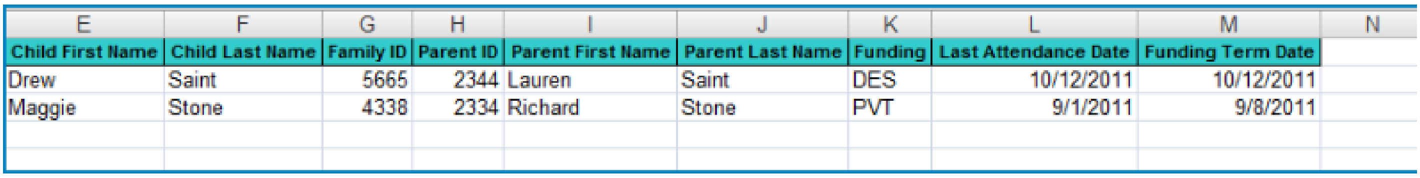
Category: --

Room: --

Example report-



Student ID	Center Code	Center Name	Child ID	Child First Name	Child Last Name	Family ID	Parent ID	Parent First Name	Parent Last Name
12555	344	Daycare Works - North	2333	Drew	Saint	5665	2344	Lauren	Saint
522	344	Daycare Works - North	4558	Maggie	Stone	4338	2334	Richard	Stone



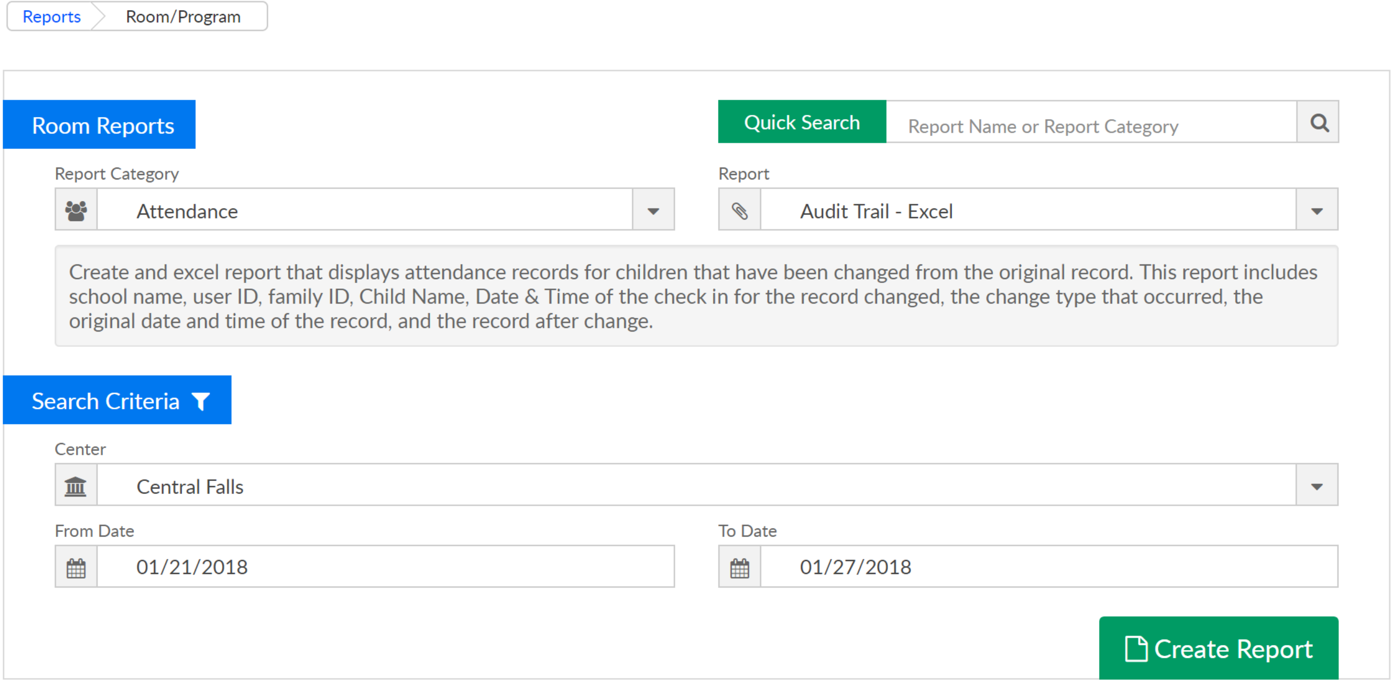
Child First Name	Child Last Name	Family ID	Parent ID	Parent First Name	Parent Last Name	Funding	Last Attendance Date	Funding Term Date
Drew	Saint	5665	2344	Lauren	Saint	DES	10/12/2011	10/12/2011
Maggie	Stone	4338	2334	Richard	Stone	PVT	9/1/2011	9/8/2011

Attendance- Audit Trail - Excel (Activity ID 1092)

Last Modified on 05/29/2018 8:57 am EDT

An excel report that displays attendance records for children that have been changed from the original record.

This report includes school name, user ID, family ID, Child Name, Date & Time of the check in for the record changed, the change type that occurred, the original date and time of the record, and the record after change.



Report Category: Attendance

Report: Audit Trail - Excel

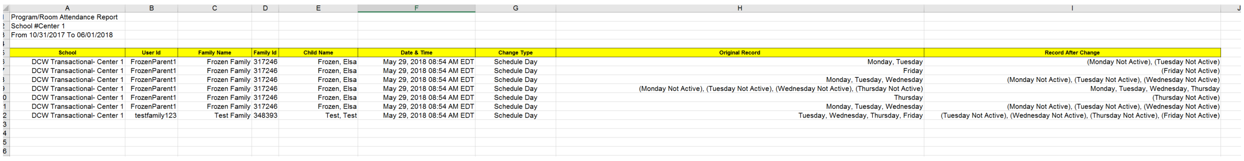
Create and excel report that displays attendance records for children that have been changed from the original record. This report includes school name, user ID, family ID, Child Name, Date & Time of the check in for the record changed, the change type that occurred, the original date and time of the record, and the record after change.

Center: Central Falls

From Date: 01/21/2018

To Date: 01/27/2018

Report Example-



Program/Room Attendance Report
School #Center 1
From 10/31/2017 To 06/01/2018

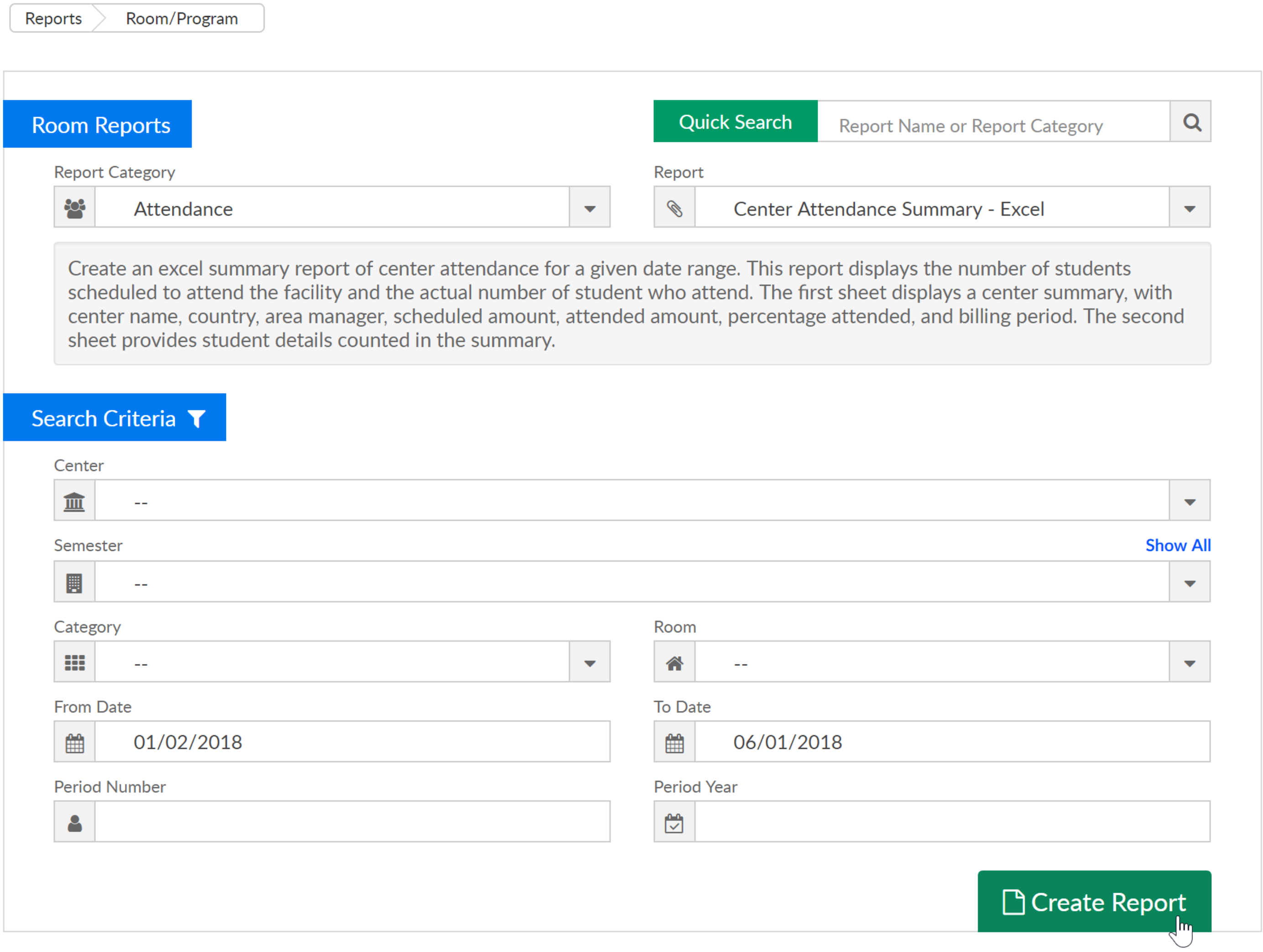
School	User Id	Family Name	Family Id	Child Name	Date & Time	Change Type	Original Record	Record After Change
DCW Transactional- Center 1	FrozenParent1	Frozen Family	317246	Frozen, Elsa	May 29, 2018 08:54 AM EDT	Schedule Day	Monday, Tuesday	(Monday Not Active), (Tuesday Not Active)
DCW Transactional- Center 1	FrozenParent1	Frozen Family	317246	Frozen, Elsa	May 29, 2018 08:54 AM EDT	Schedule Day	Friday	(Friday Not Active)
DCW Transactional- Center 1	FrozenParent1	Frozen Family	317246	Frozen, Elsa	May 29, 2018 08:54 AM EDT	Schedule Day	Monday, Tuesday, Wednesday	(Monday Not Active), (Tuesday Not Active), (Wednesday Not Active)
DCW Transactional- Center 1	FrozenParent1	Frozen Family	317246	Frozen, Elsa	May 29, 2018 08:54 AM EDT	Schedule Day	(Monday Not Active), (Tuesday Not Active), (Wednesday Not Active), (Thursday Not Active)	Monday, Tuesday, Wednesday, Thursday
DCW Transactional- Center 1	FrozenParent1	Frozen Family	317246	Frozen, Elsa	May 29, 2018 08:54 AM EDT	Schedule Day	Thursday	(Thursday Not Active)
DCW Transactional- Center 1	FrozenParent1	Frozen Family	317246	Frozen, Elsa	May 29, 2018 08:54 AM EDT	Schedule Day	Monday, Tuesday, Wednesday	(Monday Not Active), (Tuesday Not Active), (Wednesday Not Active)
DCW Transactional- Center 1	testfamily123	Test Family	348393	Test, Test	May 29, 2018 08:54 AM EDT	Schedule Day	Tuesday, Wednesday, Thursday, Friday	(Tuesday Not Active), (Wednesday Not Active), (Thursday Not Active), (Friday Not Active)

Attendance- Center Attendance Summary - Excel (Activity ID 403)

Last Modified on 05/29/2018 9:50 am EDT

A detailed report of the days the number of students scheduled to attend the facility and the actual number of students who attend the facility. There are two tabs that display summary information, detail information and scheduled versus attendance detail.

To run the report for the business as a whole leave the center field set to --. Otherwise, if a specific site is selected data will only display for the selected site.



Report Category: Attendance

Report: Center Attendance Summary - Excel

Create an excel summary report of center attendance for a given date range. This report displays the number of students scheduled to attend the facility and the actual number of student who attend. The first sheet displays a center summary, with center name, country, area manager, scheduled amount, attended amount, percentage attended, and billing period. The second sheet provides student details counted in the summary.

Center: --

Semester: --

Category: --

Room: --

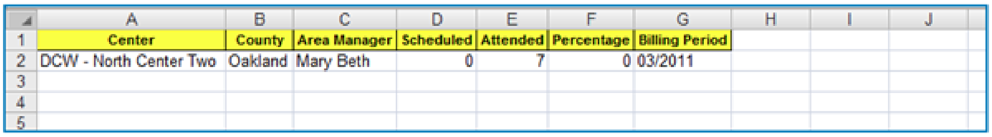
From Date: 01/02/2018

To Date: 06/01/2018

Period Number:

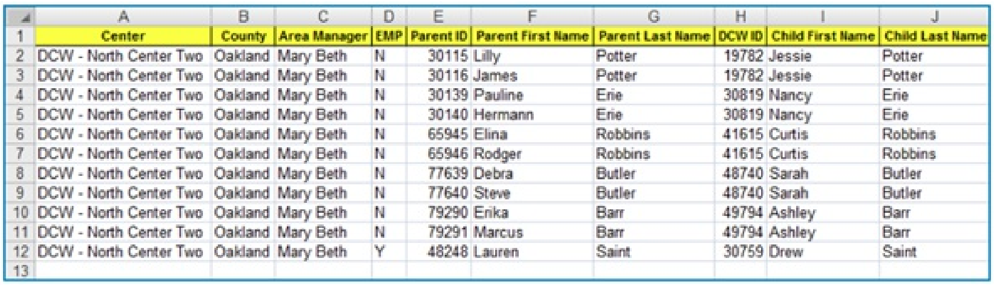
Period Year:

Center Attendance Summary tab- this tab will display center name, county, area manager, number of children scheduled, number of children that attended, the percentage of attendance and the billing period (if set to defined billing).

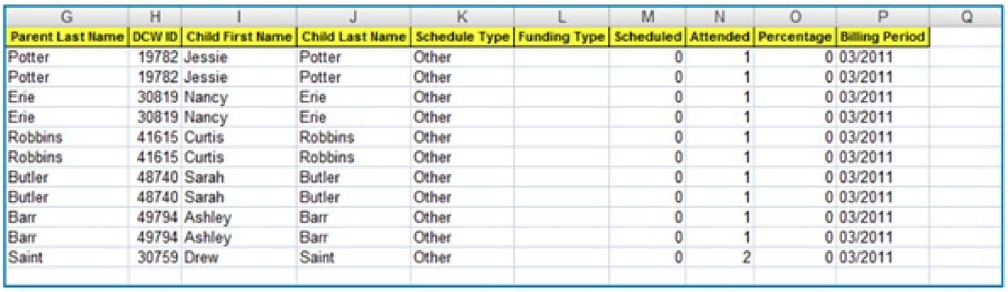


Center	County	Area Manager	Scheduled	Attended	Percentage	Billing Period
DCW - North Center Two	Oakland	Mary Beth	0	7	0	03/2011

Child Center Attendance Summary- this tab will display specific child detail in summary for the time period that has been entered in the search criteria.



Center	County	Area Manager	EMP	Parent ID	Parent First Name	Parent Last Name	DCW ID	Child First Name	Child Last Name
DCW - North Center Two	Oakland	Mary Beth	N	30115	Lilly	Potter	19782	Jessie	Potter
DCW - North Center Two	Oakland	Mary Beth	N	30116	James	Potter	19782	Jessie	Potter
DCW - North Center Two	Oakland	Mary Beth	N	30139	Pauline	Erie	30819	Nancy	Erie
DCW - North Center Two	Oakland	Mary Beth	N	30140	Hermann	Erie	30819	Nancy	Erie
DCW - North Center Two	Oakland	Mary Beth	N	65945	Elina	Robbins	41615	Curtis	Robbins
DCW - North Center Two	Oakland	Mary Beth	N	65946	Rodger	Robbins	41615	Curtis	Robbins
DCW - North Center Two	Oakland	Mary Beth	N	77639	Debra	Butler	48740	Sarah	Butler
DCW - North Center Two	Oakland	Mary Beth	N	77640	Steve	Butler	48740	Sarah	Butler
DCW - North Center Two	Oakland	Mary Beth	N	79290	Erika	Barr	49794	Ashley	Barr
DCW - North Center Two	Oakland	Mary Beth	N	79291	Marcus	Barr	49794	Ashley	Barr
DCW - North Center Two	Oakland	Mary Beth	Y	48248	Lauren	Saint	30759	Drew	Saint



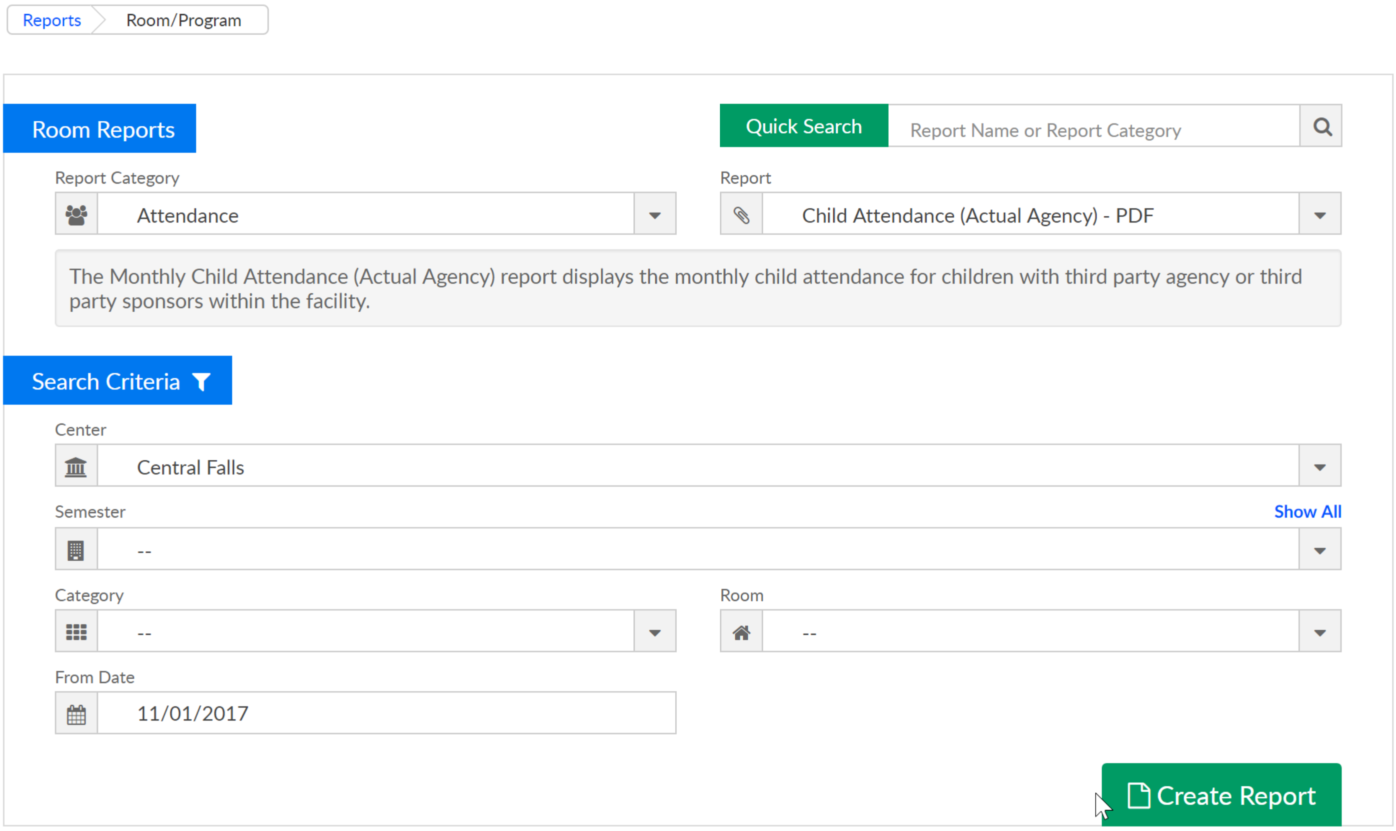
Parent Last Name	DCW ID	Child First Name	Child Last Name	Schedule Type	Funding Type	Scheduled	Attended	Percentage	Billing Period
Potter	19782	Jessie	Potter	Other		0	1	0	03/2011
Potter	19782	Jessie	Potter	Other		0	1	0	03/2011
Erie	30819	Nancy	Erie	Other		0	1	0	03/2011
Erie	30819	Nancy	Erie	Other		0	1	0	03/2011
Robbins	41615	Curtis	Robbins	Other		0	1	0	03/2011
Robbins	41615	Curtis	Robbins	Other		0	1	0	03/2011
Butler	48740	Sarah	Butler	Other		0	1	0	03/2011
Butler	48740	Sarah	Butler	Other		0	1	0	03/2011
Barr	49794	Ashley	Barr	Other		0	1	0	03/2011
Barr	49794	Ashley	Barr	Other		0	1	0	03/2011
Saint	30759	Drew	Saint	Other		0	2	0	03/2011

Attendance- Child Attendance (Actual Agency) - PDF (Activity ID 559)

Last Modified on 05/29/2018 9:54 am EDT

The Monthly Child Attendance (Actual Agency) report displays the monthly child attendance for children with third party agency or third party sponsors within the facility.

- Semester: The semester assigned to the classroom or program.
- Month: The month for the Monthly Child Attendance (Actual Agency) PDF.
- First Name, Last Name, Student ID#: The first name, last name and student identification number for the child.
- Month: The month for the Monthly Child Attendance report.
- Week: The number of week assigned for the Monthly Child Attendance report.
- Date of Week: The date of the week for the Monthly Child Attendance report.
- Mon/Tues/Wed/Thurs/Fri: The days the child attended the facility for the days during the week.



Report Category: Attendance

Report: Child Attendance (Actual Agency) - PDF

The Monthly Child Attendance (Actual Agency) report displays the monthly child attendance for children with third party agency or third party sponsors within the facility.

Center: Central Falls

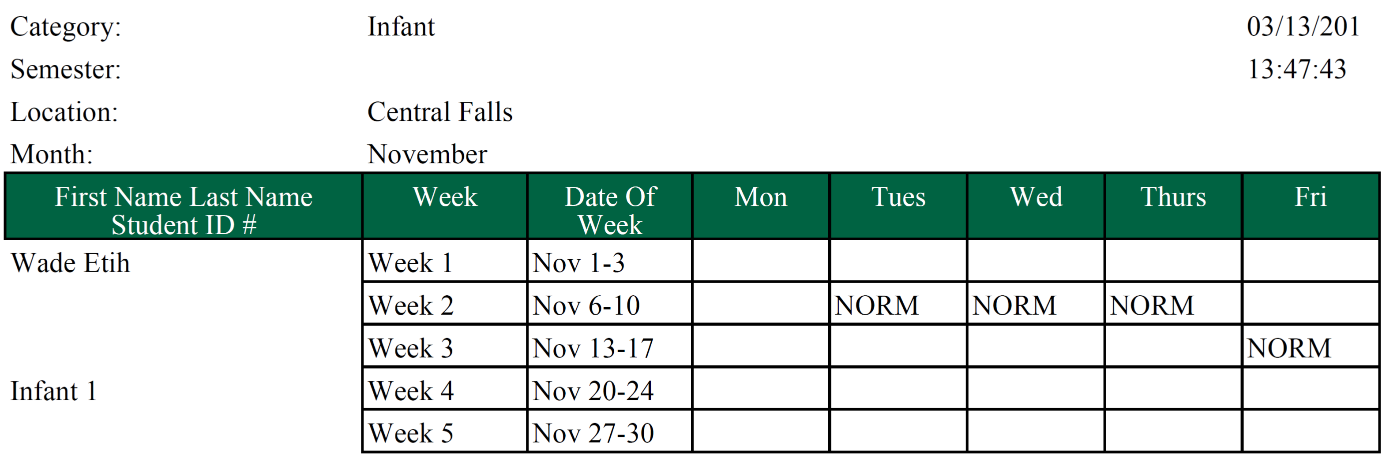
Semester: --

Category: --

Room: --

From Date: 11/01/2017

Example report-



Category: Infant 03/13/201

Semester: 13:47:43

Location: Central Falls

Month: November

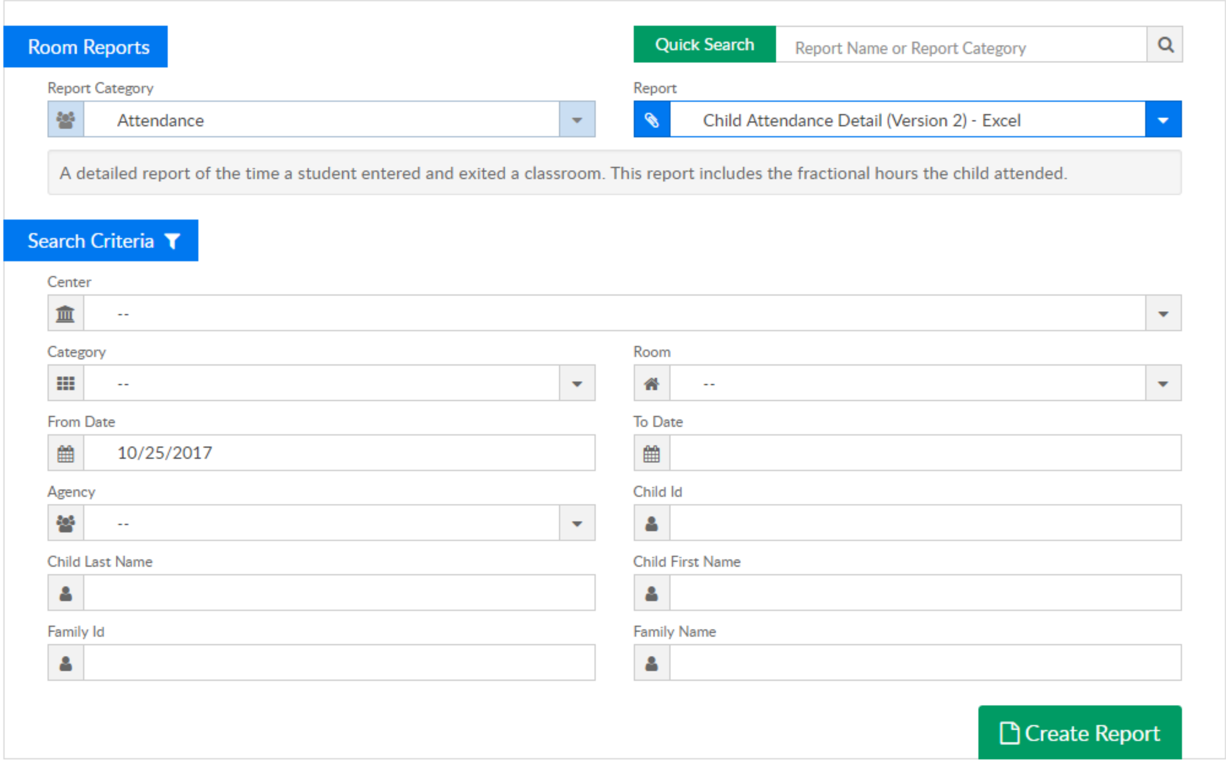
First Name Last Name Student ID #	Week	Date Of Week	Mon	Tues	Wed	Thurs	Fri
Wade Etih	Week 1	Nov 1-3					
	Week 2	Nov 6-10		NORM	NORM	NORM	
	Week 3	Nov 13-17					NORM
Infant 1	Week 4	Nov 20-24					
	Week 5	Nov 27-30					

Attendance- Child Attendance Detail (Version 2) - Excel (Activity ID 969)

Last Modified on 05/29/2018 9:56 am EDT

This report provides a weekly attendance record of children's check-ins and check-outs, including check-in/check-out date, time, family ID, child ID, and first and last name.

- Date of Report: The date the report was created.
- Date Range: The date range for the report.
- Family Id: The family identification number for the student.
- Child Id: The child identification number for the student.
- Record #: The record number assigned to the child.
- First Name: The first name for the student in the classroom.
- Last Name: The last name for the student in the classroom.
- center: The name of the center or center the student is enrolled in.
- Room: The name of the classroom or room/program the student is enrolled in.
- Date In: The date the child was checked into the classroom.
- Time In: The time the student was enrolled into the classroom.
- Time In User ID: The name of the user that checked the child into the classroom.
- Time Out: The time the student was removed from the classroom.
- Time Out User ID: The name of the user that checked the child into the classroom.
- Total Hours Actual: The total number of hours the student was enrolled in the classroom.
- Total Hours Fractional: The total number of hours the student as enrolled in the classroom, in fractional rounding.
- Attendance Code: The attendance code for the student in the classroom.



Report Category: Attendance

Report: Child Attendance Detail (Version 2) - Excel

A detailed report of the time a student entered and exited a classroom. This report includes the fractional hours the child attended.

Center: --

Category: --

Room: --

From Date: 10/25/2017

To Date:

Agency: --

Child Id:

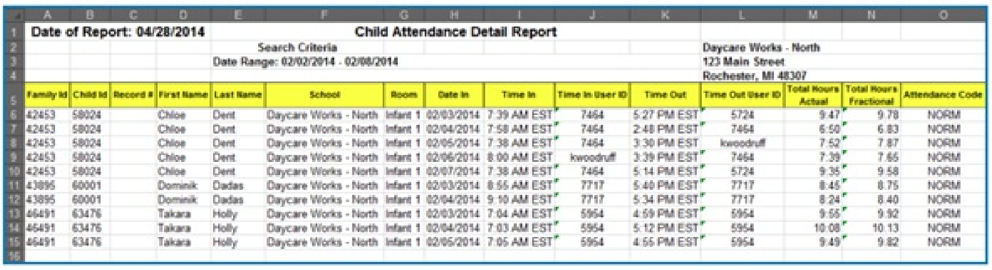
Child Last Name:

Child First Name:

Family Id:

Family Name:

Example Report:



Date of Report: 04/28/2014

Child Attendance Detail Report

Search Criteria
Date Range: 02/02/2014 - 02/08/2014

Daycare Works - North
123 Main Street
Rochester, MI 48307

Family Id	Child Id	Record #	First Name	Last Name	School	Room	Date In	Time In	Time In User ID	Time Out	Time Out User ID	Total Hours Actual	Total Hours Fractional	Attendance Code
42453	58024		Chloe	Dent	Daycare Works - North	Infant 1	02/03/2014	7:39 AM EST	7464	5:27 PM EST	5724	9:47	9.78	NORM
42453	58024		Chloe	Dent	Daycare Works - North	Infant 1	02/04/2014	7:58 AM EST	7464	2:48 PM EST	7464	6:50	6.83	NORM
42453	58024		Chloe	Dent	Daycare Works - North	Infant 1	02/05/2014	7:38 AM EST	7464	3:30 PM EST	kwoodruff	7:52	7.87	NORM
42453	58024		Chloe	Dent	Daycare Works - North	Infant 1	02/06/2014	8:00 AM EST	kwoodruff	3:39 PM EST	7464	7:39	7.65	NORM
42453	58024		Chloe	Dent	Daycare Works - North	Infant 1	02/07/2014	7:38 AM EST	7464	5:14 PM EST	5724	9:35	9.58	NORM
43895	60001		Dominik	Dadas	Daycare Works - North	Infant 1	02/03/2014	8:55 AM EST	7717	5:40 PM EST	7717	8:45	8.75	NORM
43895	60001		Dominik	Dadas	Daycare Works - North	Infant 1	02/04/2014	9:10 AM EST	7717	5:34 PM EST	7717	8:24	8.40	NORM
46491	63476		Takara	Holly	Daycare Works - North	Infant 1	02/03/2014	7:04 AM EST	5954	4:59 PM EST	5954	9:55	9.92	NORM
46491	63476		Takara	Holly	Daycare Works - North	Infant 1	02/04/2014	7:03 AM EST	5954	5:12 PM EST	5954	10:08	10.13	NORM
46491	63476		Takara	Holly	Daycare Works - North	Infant 1	02/05/2014	7:05 AM EST	5954	4:55 PM EST	5954	9:49	9.82	NORM

Attendance- Child Attendance Detail - Excel (Activity ID 541)

Last Modified on 05/29/2018 9:59 am EDT

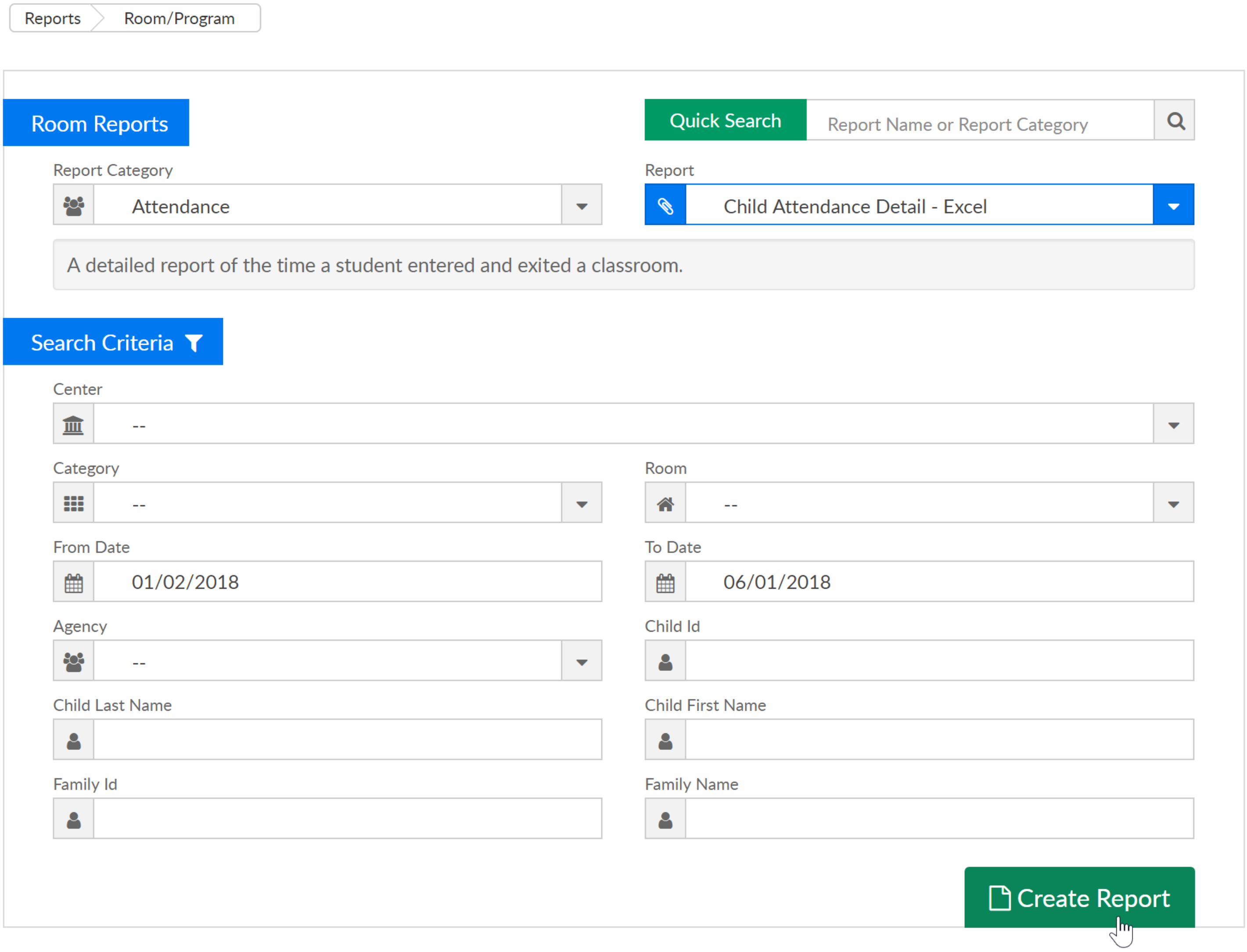
This report provides a summary of child attendance for a given week and includes First and Last Name, Date and Time of Check in/Check out, as well as the username or PIN of the person who checked the child in or out. The report also shows Total Hours Actual and Total Hours Fractional.

This report is useful for verifying a child's attendance for billing purposes

Required Fields: Business Level or Center Name

Note: **If From Date** and **To Date** are not selected, then the report will pull from the current week.

- Family Id: The family identification number for the student.
- Child Id: The child identification number for the student.
- First Name: The first name for the student in the classroom.
- Last Name: The last name for the student in the classroom.
- Center: The name of the center or center the student is enrolled in.
- Room: The name of the classroom or room/program the student is enrolled in.
- Time In: The time the student was enrolled into the classroom.
- Time In User ID: The name of the user that checked the child into the classroom.
- Time Out: The time the student was removed from the classroom.
- Time Out User ID: The name of the user that checked the child into the classroom.
- Total Hours: The total number of hours the student was enrolled in the classroom.
- Attendance Code: The attendance code for the student in the classroom.



Reports Room/Program

Room Reports

Quick Search
Report Name or Report Category

Report Category: Attendance

Report: Child Attendance Detail - Excel

A detailed report of the time a student entered and exited a classroom.

Search Criteria

Center: --

Category: --

Room: --

From Date: 01/02/2018

To Date: 06/01/2018

Agency: --

Child Id:

Child Last Name:

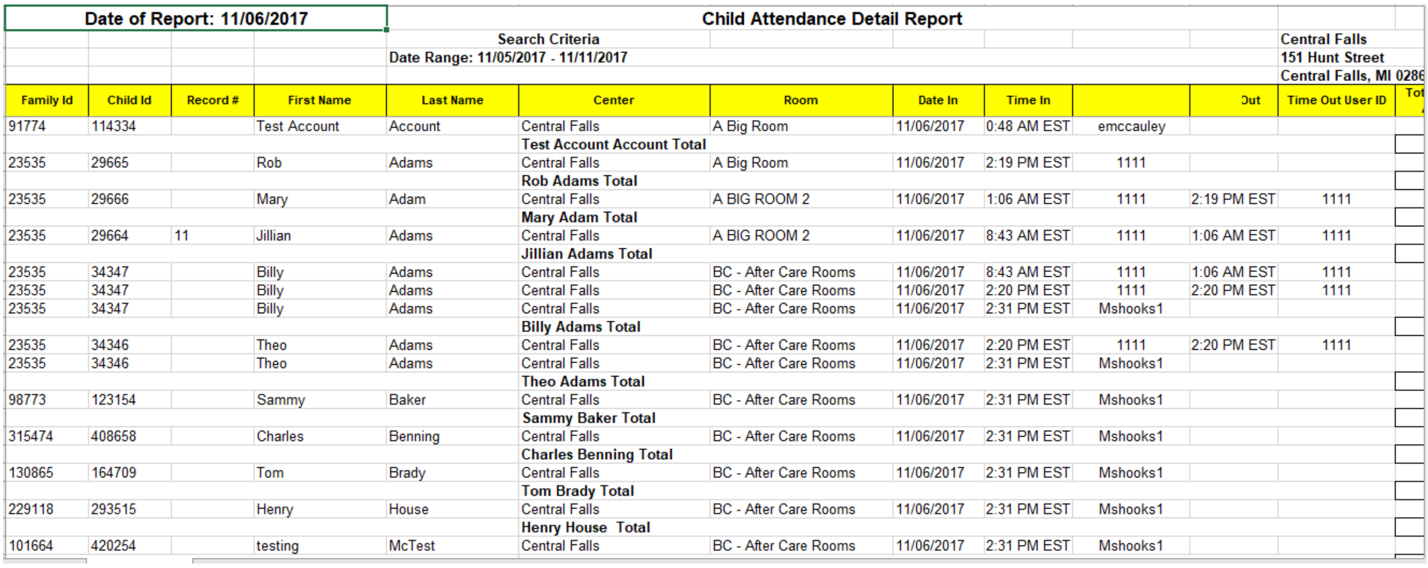
Child First Name:

Family Id:

Family Name:

Create Report

Report Example:



Date of Report: 11/06/2017

Child Attendance Detail Report

Search Criteria
Date Range: 11/05/2017 - 11/11/2017

Central Falls
151 Hunt Street
Central Falls, MI 0286

Family Id	Child Id	Record #	First Name	Last Name	Center	Room	Date In	Time In		Out	Time Out User ID	Tot
91774	114334		Test Account	Account	Central Falls	A Big Room	11/06/2017	0:48 AM EST	emccauley			
					Test Account Account Total							
23535	29665		Rob	Adams	Central Falls	A Big Room	11/06/2017	2:19 PM EST	1111			
					Rob Adams Total							
23535	29666		Mary	Adam	Central Falls	A BIG ROOM 2	11/06/2017	1:06 AM EST	1111	2:19 PM EST	1111	
					Mary Adam Total							
23535	29664	11	Jillian	Adams	Central Falls	A BIG ROOM 2	11/06/2017	8:43 AM EST	1111	1:06 AM EST	1111	
					Jillian Adams Total							
23535	34347		Billy	Adams	Central Falls	BC - After Care Rooms	11/06/2017	8:43 AM EST	1111	1:06 AM EST	1111	
23535	34347		Billy	Adams	Central Falls	BC - After Care Rooms	11/06/2017	2:20 PM EST	1111	2:20 PM EST	1111	
23535	34347		Billy	Adams	Central Falls	BC - After Care Rooms	11/06/2017	2:31 PM EST	Mshooks1			
					Billy Adams Total							
23535	34346		Theo	Adams	Central Falls	BC - After Care Rooms	11/06/2017	2:20 PM EST	1111	2:20 PM EST	1111	
23535	34346		Theo	Adams	Central Falls	BC - After Care Rooms	11/06/2017	2:31 PM EST	Mshooks1			
					Theo Adams Total							
98773	123154		Sammy	Baker	Central Falls	BC - After Care Rooms	11/06/2017	2:31 PM EST	Mshooks1			
					Sammy Baker Total							
315474	408658		Charles	Benning	Central Falls	BC - After Care Rooms	11/06/2017	2:31 PM EST	Mshooks1			
					Charles Benning Total							
130865	164709		Tom	Brady	Central Falls	BC - After Care Rooms	11/06/2017	2:31 PM EST	Mshooks1			
					Tom Brady Total							
229118	293515		Henry	House	Central Falls	BC - After Care Rooms	11/06/2017	2:31 PM EST	Mshooks1			
					Henry House Total							
101664	420254		testing	McTest	Central Falls	BC - After Care Rooms	11/06/2017	2:31 PM EST	Mshooks1			

Attendance- Child Attendance Reconcile Summary - Excel (Actvity ID 522)

Last Modified on 05/29/2018 10:07 am EDT

A detailed report of the days a child was scheduled to attend a facility and the actual number of days the child attended the facility.

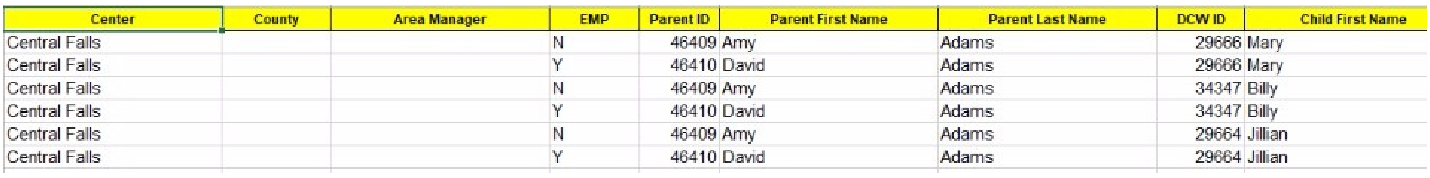
If no date is entered in the From Date field, the report will pull from the first day of the current week to today's date. If a date is entered, then the report will pull from the first day of the billing period that corresponds to that date up until the From Date entered.

Note: Below screenshot shows a split view of the report; left side columns on top top and right side columns on bottom/second row.

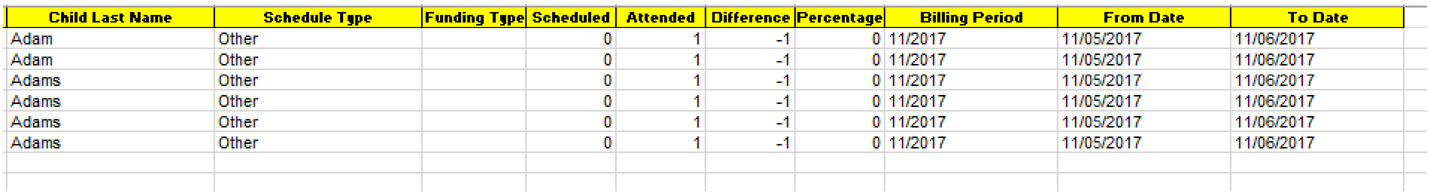
- Center: The facility the child is enrolled within.
- County: The county for the facility the child is enrolled within.
- Area Manager: The name of the area manager for the facility.
- Emp: If the parent is an employee for the company, a Y will be displayed within the EMP column.
- Parent ID: The identification number for the parent or legal guardian for the child.
- Parent First Name: The first name of the parent or legal guardian for the child.
- Parent Last Name: The last name of the parent or legal guardian for the child.
- DCW ID: The the Platform identification number assigned to the child.
- Child First Name: The first name of the child.
- Child Last Name: The last name of the child.
- Schedule Type: The schedule type assigned to the child.
- Funding Type: The third party sponsor assigned to the child.
- Scheduled: The number of days the child was scheduled to attend the facility.
- Attended: The number of days the child actually attended the facility.
- Difference: The number of days the child was scheduled to attend the facility minus the number of days the child actually attended the facility.
- Percentage: The percentage of the days the child attended the facility compared to the number of days the child was scheduled to attend the facility.

- Billing Period: The billing period for the Child Attendance Reconcile Summary report.
- From Date: The starting date for the Child Attendance Reconcile Summary report.
- To Date: The end date for the Child Attendance Reconcile Summary report.

Report Example-



Center	County	Area Manager	EMP	Parent ID	Parent First Name	Parent Last Name	DCW ID	Child First Name
Central Falls			N	46409	Amy	Adams	29666	Mary
Central Falls			Y	46410	David	Adams	29666	Mary
Central Falls			N	46409	Amy	Adams	34347	Billy
Central Falls			Y	46410	David	Adams	34347	Billy
Central Falls			N	46409	Amy	Adams	29664	Jillian
Central Falls			Y	46410	David	Adams	29664	Jillian



Child Last Name	Schedule Type	Funding Type	Scheduled	Attended	Difference	Percentage	Billing Period	From Date	To Date
Adam	Other		0	1	-1	0	11/2017	11/05/2017	11/06/2017
Adam	Other		0	1	-1	0	11/2017	11/05/2017	11/06/2017
Adams	Other		0	1	-1	0	11/2017	11/05/2017	11/06/2017
Adams	Other		0	1	-1	0	11/2017	11/05/2017	11/06/2017
Adams	Other		0	1	-1	0	11/2017	11/05/2017	11/06/2017
Adams	Other		0	1	-1	0	11/2017	11/05/2017	11/06/2017

Attendance- Child Withdrawal Detail - Excel (Activity ID 589)

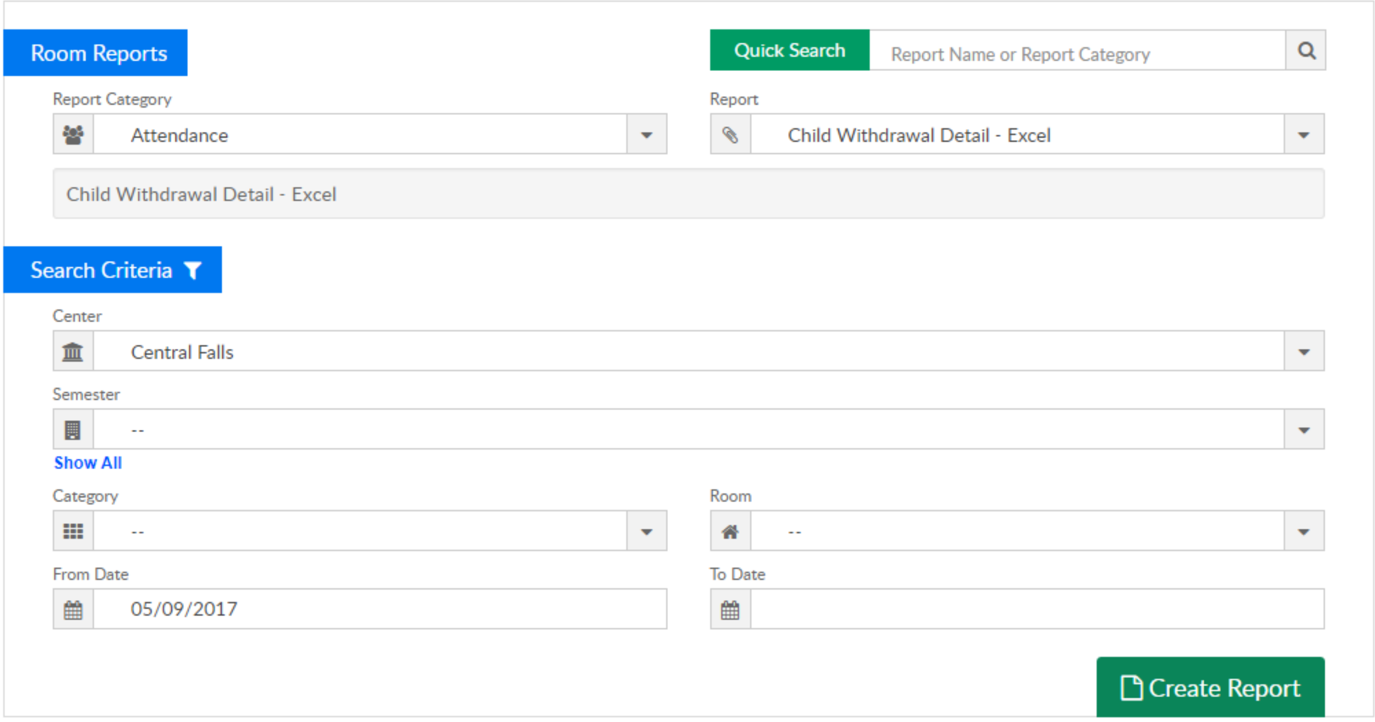
Last Modified on 05/29/2018 2:51 pm EDT

This report provides a quick reference of children who have withdrawn from a program. It includes the child ID, date of discharge, as well as the reason for discharge.

- Child ID: The identification number for the child.
- Child Name: The last name and first name of the child.
- Address: The home address for the child.
- City: The city the child lives in.
- State: The state the child lives in.
- Zip: The zip code for the child.
- Home Phone: The home telephone number for the child.
- Date of Discharge: The date the child withdrew from the facility.
- Discharge Reason: The reason selected for the child to withdraw from the facility.
- Mother's Name: The last and first name of the mother or guardian for the child.
- Address: The home address for the mother or guardian.
- City: The city the mother or guardian lives in.
- State: The state the mother or guardian lives in.
- Zip: The zip code for the mother or guardian.
- Home Phone: The home telephone number for the mother or guardian for the child.
- Cell Phone: The cellular telephone number for the mother or guardian for the child.
- Email: The email address for the mother or guardian for the child.
- Father's Name: The last and first name of the father or guardian for the child.
- Address: The home address for the father or guardian for the child.
- City: The city the father or guardian lives in.
- State: The state the father or guardian lives in.
- Zip: The zip code for the father or guardian.
- Home Phone: The home telephone number for the father or guardian for the

child.

- Cell Phone: The cellular telephone number for the father or guardian for the child.
- Email: The email address for the father or guardian for the child.



Report Category: Attendance

Report: Child Withdrawal Detail - Excel

Child Withdrawal Detail - Excel

Center: Central Falls

Semester: --

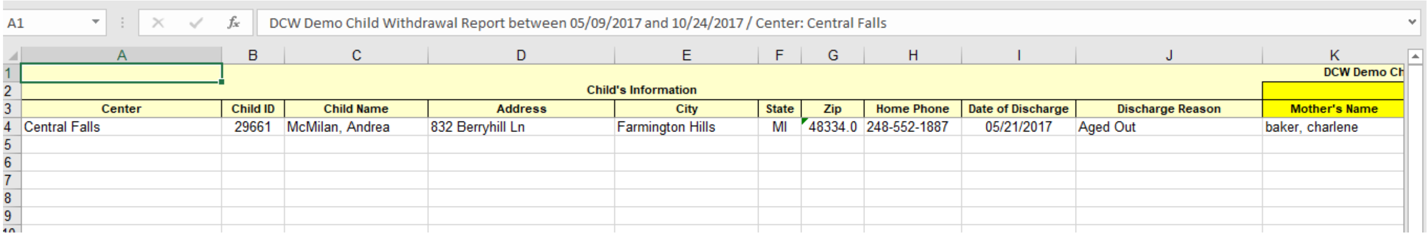
Category: --

Room: --

From Date: 05/09/2017

To Date:

Report Example:



DCW Demo Child Withdrawal Report between 05/09/2017 and 10/24/2017 / Center: Central Falls

	A	B	C	D	E	F	G	H	I	J	K
1											DCW Demo Ch
2					Child's Information						
3	Center	Child ID	Child Name	Address	City	State	Zip	Home Phone	Date of Discharge	Discharge Reason	Mother's Name
4	Central Falls	29661	McMilan, Andrea	832 Berryhill Ln	Farmington Hills	MI	48334.0	248-552-1887	05/21/2017	Aged Out	baker, charlene
5											
6											
7											
8											
9											

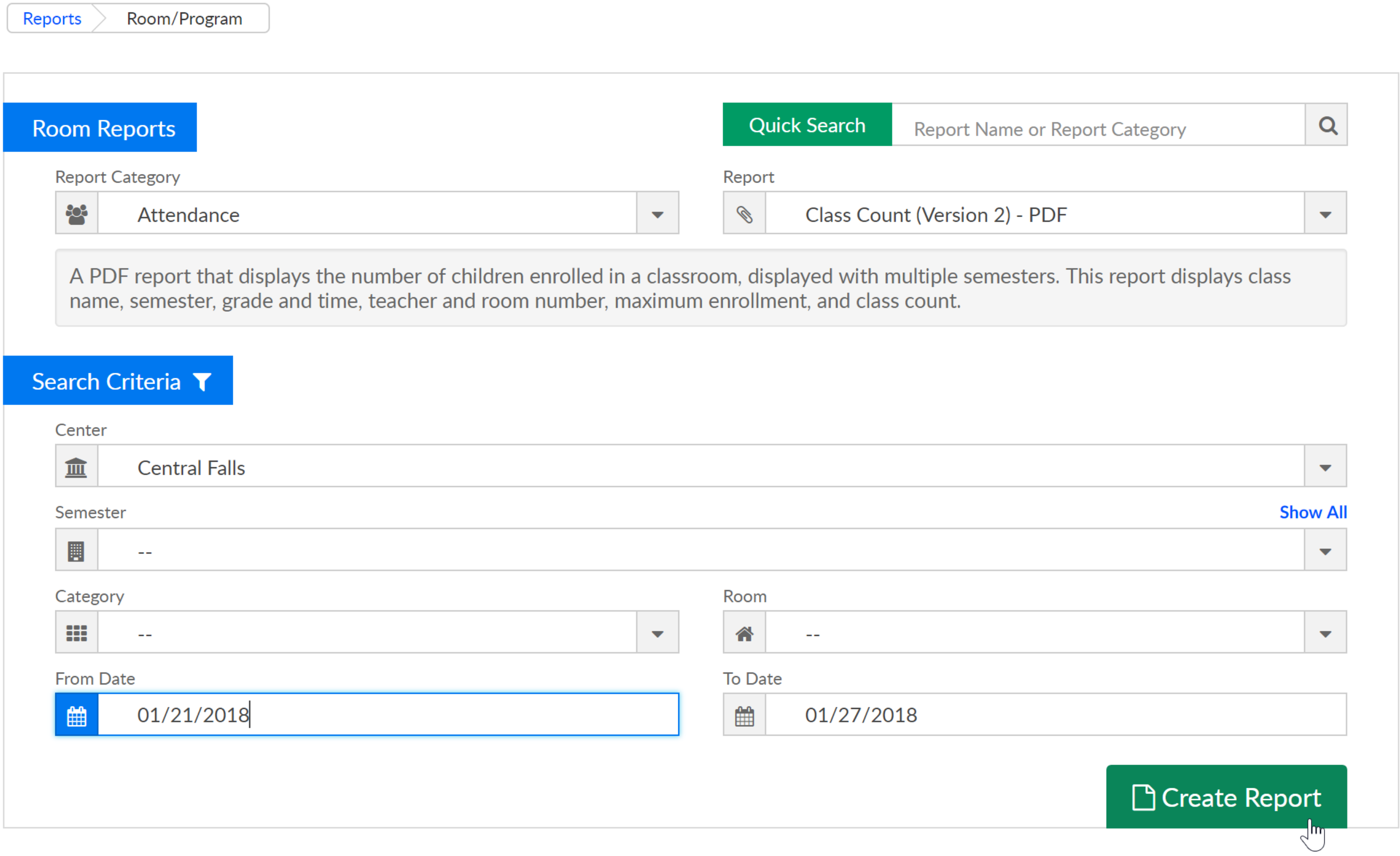
Attendance- Class Count (Version 2) - PDF (Activity ID 725)

Last Modified on 05/29/2018 2:52 pm EDT

A PDF report that displays the number of children enrolled in a classroom, displayed with multiple semesters.

This report displays class name, semester, grade and time, teacher and room number, maximum enrollment, and class count.

- Date Range: The date range for the class count.
- Class Name: The name of the classroom or program.
- Semester: The semesters assigned to the classrooms.
- Grade & Time: The grade or any additional information added to the semester in the Extra Information section.
- Teacher/Room #: The teacher and classroom information for the classroom.
- Maximum Enrollment: The maximum number of children that can enroll into the classroom for the semester.
- Class Count: The current number of children enrolled in the classroom for the semester.



Report Category: Attendance

Report: Class Count (Version 2) - PDF

A PDF report that displays the number of children enrolled in a classroom, displayed with multiple semesters. This report displays class name, semester, grade and time, teacher and room number, maximum enrollment, and class count.

Center: Central Falls

Semester: --

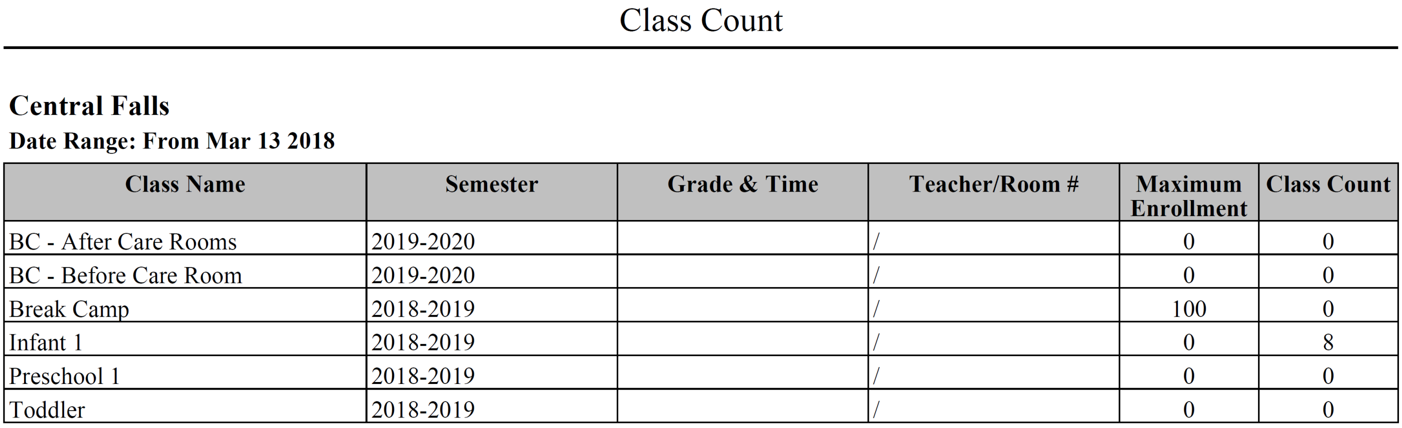
Category: --

Room: --

From Date: 01/21/2018

To Date: 01/27/2018

Example Report-



Class Count

Central Falls

Date Range: From Mar 13 2018

Class Name	Semester	Grade & Time	Teacher/Room #	Maximum Enrollment	Class Count
BC - After Care Rooms	2019-2020		/	0	0
BC - Before Care Room	2019-2020		/	0	0
Break Camp	2018-2019		/	100	0
Infant 1	2018-2019		/	0	8
Preschool 1	2018-2019		/	0	0
Toddler	2018-2019		/	0	0

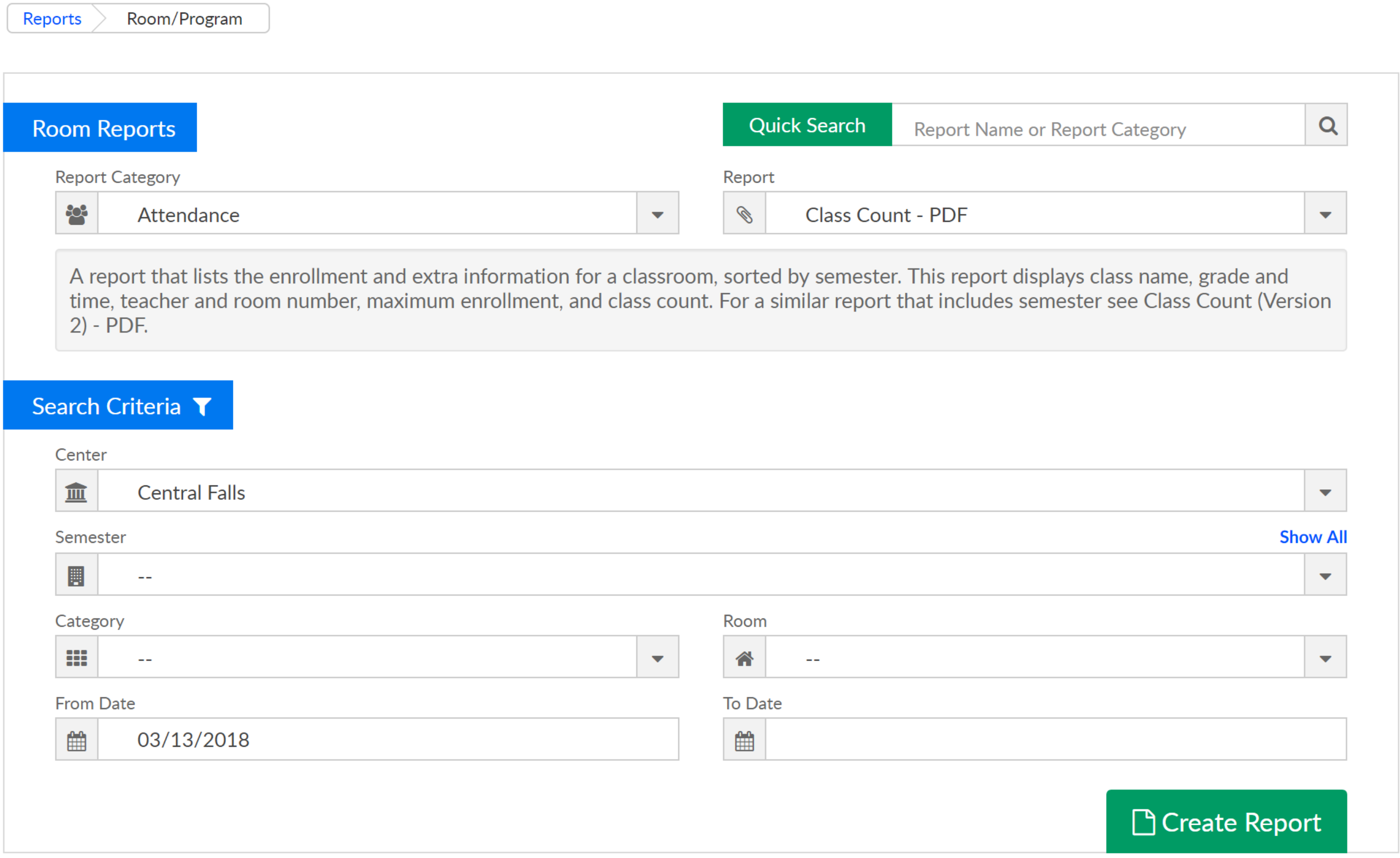
Attendance- Class Count - PDF (Activity ID 723)

Last Modified on 05/29/2018 2:54 pm EDT

The Class Count-PDF report allows you to view semester enrollment counts organized by classroom. The report displays the maximum enrollment along with the total enrolled.

- Date Range: The date range for the class count.
- Semester: The semesters assigned to the classrooms.
- Class Name: The name of the classroom or program.
- Grade & Time: The grade or any additional information added to the semester in the Extra Information section.
- Teacher/Room #: The teacher and classroom information for the classroom.
- Maximum Enrollment: The maximum number of children that can enroll into the classroom for the semester.
- Class Count: The current number of children enrolled in the classroom for the semester.

Required Fields: Report can be pulled for a specific date range or you can enter From Date only to pull from From Date to present.



Reports > Room/Program

Room Reports

Report Category: Attendance

Report: Class Count - PDF

A report that lists the enrollment and extra information for a classroom, sorted by semester. This report displays class name, grade and time, teacher and room number, maximum enrollment, and class count. For a similar report that includes semester see Class Count (Version 2) - PDF.

Search Criteria

Center: Central Falls

Semester: --

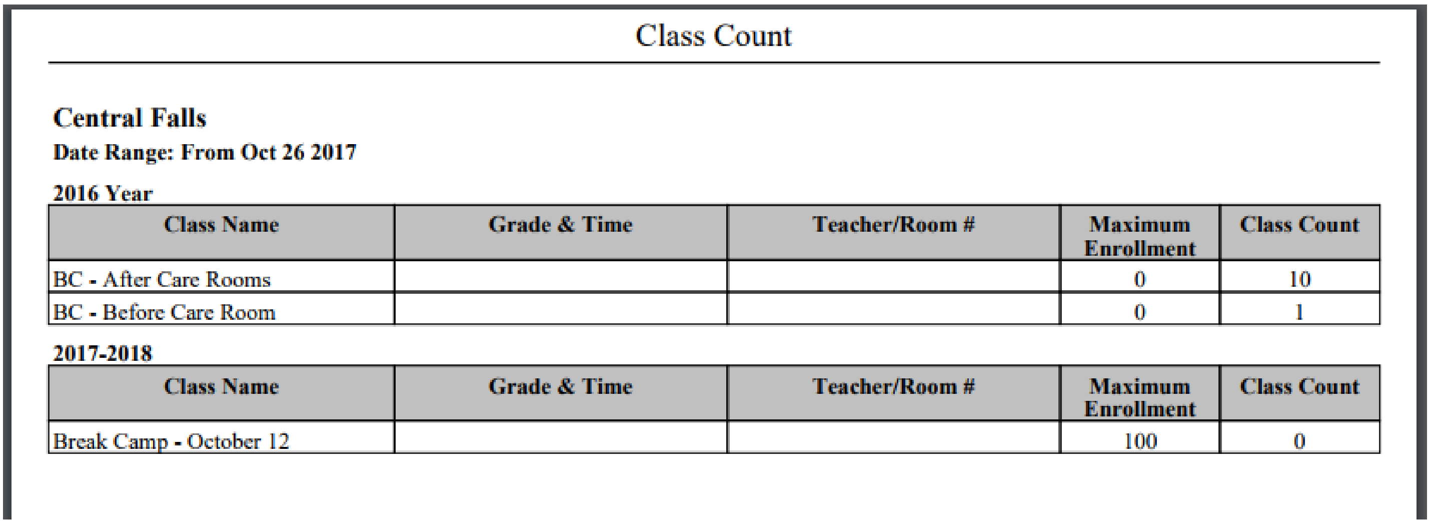
Category: --

Room: --

From Date: 03/13/2018

To Date:

Report Example:



Class Count

Central Falls

Date Range: From Oct 26 2017

2016 Year

Class Name	Grade & Time	Teacher/Room #	Maximum Enrollment	Class Count
BC - After Care Rooms			0	10
BC - Before Care Room			0	1

2017-2018

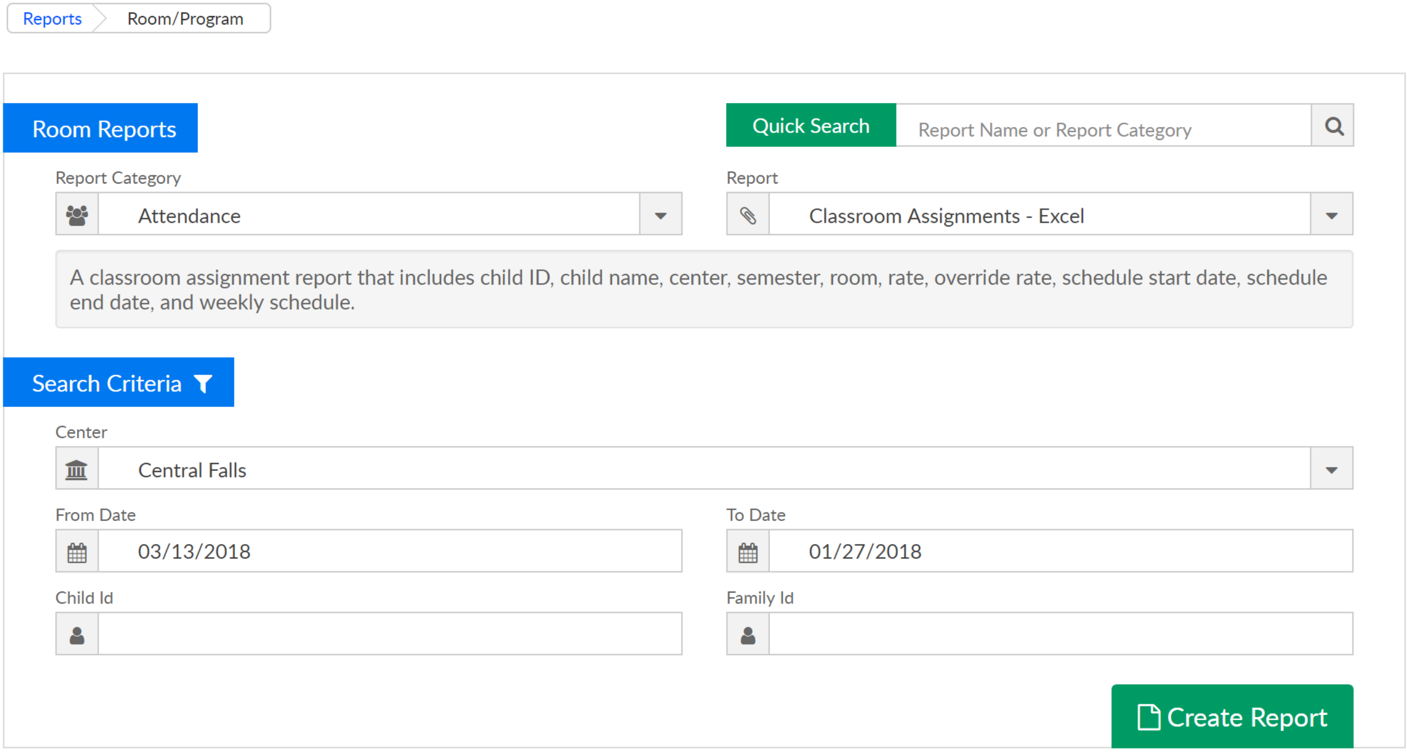
Class Name	Grade & Time	Teacher/Room #	Maximum Enrollment	Class Count
Break Camp - October 12			100	0

Attendance- Classroom Assignments- Excel (Activity ID 815)

Last Modified on 05/29/2018 3:00 pm EDT

A classroom assignment report that includes child ID, child name, center, semester, room, rate, override rate, schedule start date, schedule end date, and weekly schedule.

- Name: The last name and first name of the child.
- Time: The time the child is scheduled to attend the classroom.
- Grade: The grade range assigned to the classroom.
- Class Name: The name of the classroom.
- Teacher/Room #: The name of the teacher and the room number assigned to the classroom.



Report Category: Attendance

Report: Classroom Assignments - Excel

A classroom assignment report that includes child ID, child name, center, semester, room, rate, override rate, schedule start date, schedule end date, and weekly schedule.

Center: Central Falls

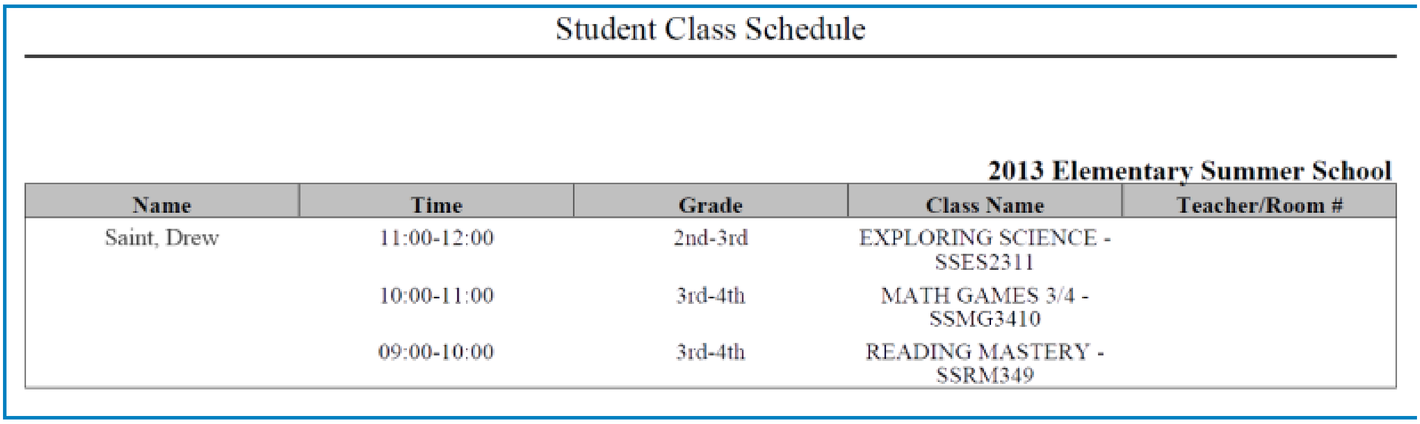
From Date: 03/13/2018

To Date: 01/27/2018

Child Id:

Family Id:

Report Example-



Student Class Schedule

2013 Elementary Summer School

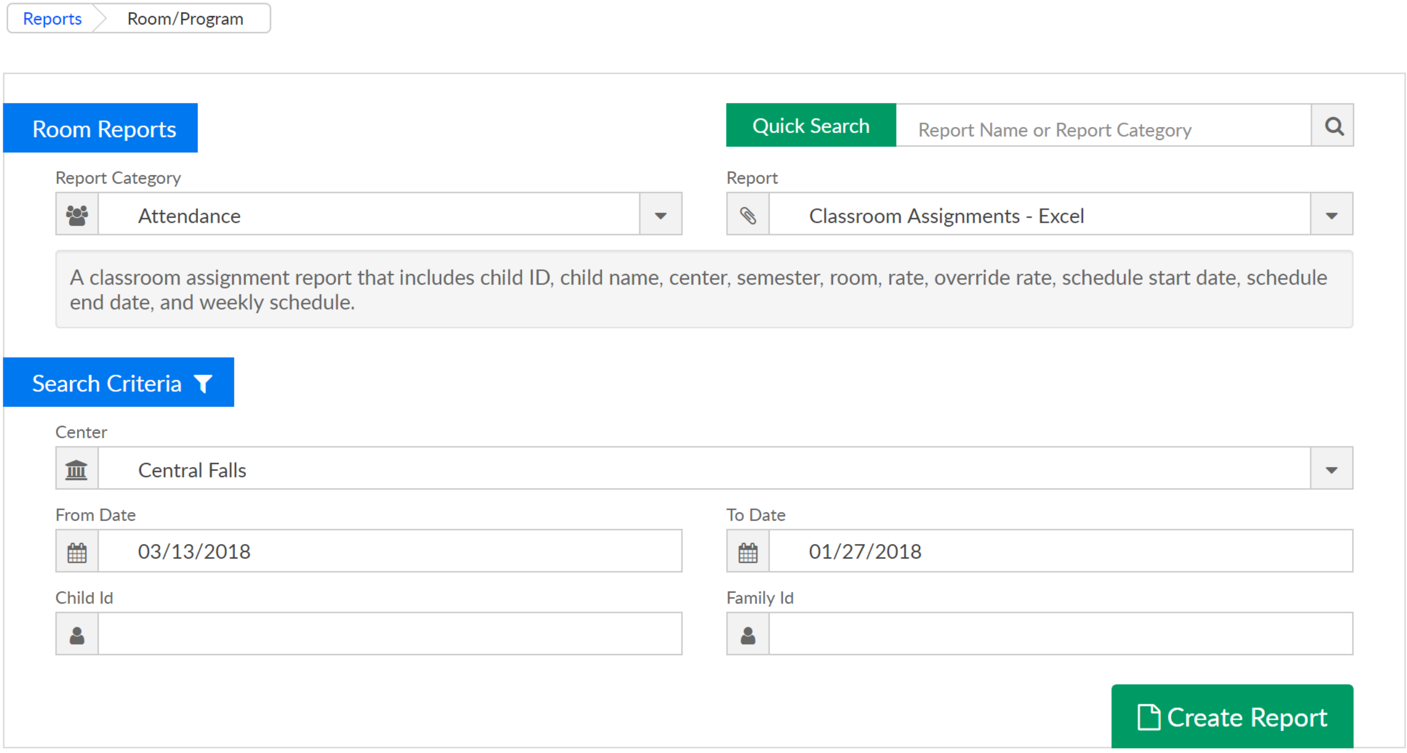
Name	Time	Grade	Class Name	Teacher/Room #
Saint, Drew	11:00-12:00	2nd-3rd	EXPLORING SCIENCE - SSES2311	
	10:00-11:00	3rd-4th	MATH GAMES 3/4 - SSMG3410	
	09:00-10:00	3rd-4th	READING MASTERY - SSRM349	

Attendance- Classroom Assignments - PDF (Activity ID 1587)

Last Modified on 05/29/2018 3:01 pm EDT

A classroom assignment report that includes child ID, child name, center, semester, room, rate, override rate, schedule start date, schedule end date, and weekly schedule.

- Name: The last name and first name of the child.
- Time: The time the child is scheduled to attend the classroom.
- Grade: The grade range assigned to the classroom.
- Class Name: The name of the classroom.
- Teacher/Room #: The name of the teacher and the room number assigned to the classroom.



Report Category: Attendance

Report: Classroom Assignments - Excel

A classroom assignment report that includes child ID, child name, center, semester, room, rate, override rate, schedule start date, schedule end date, and weekly schedule.

Center: Central Falls

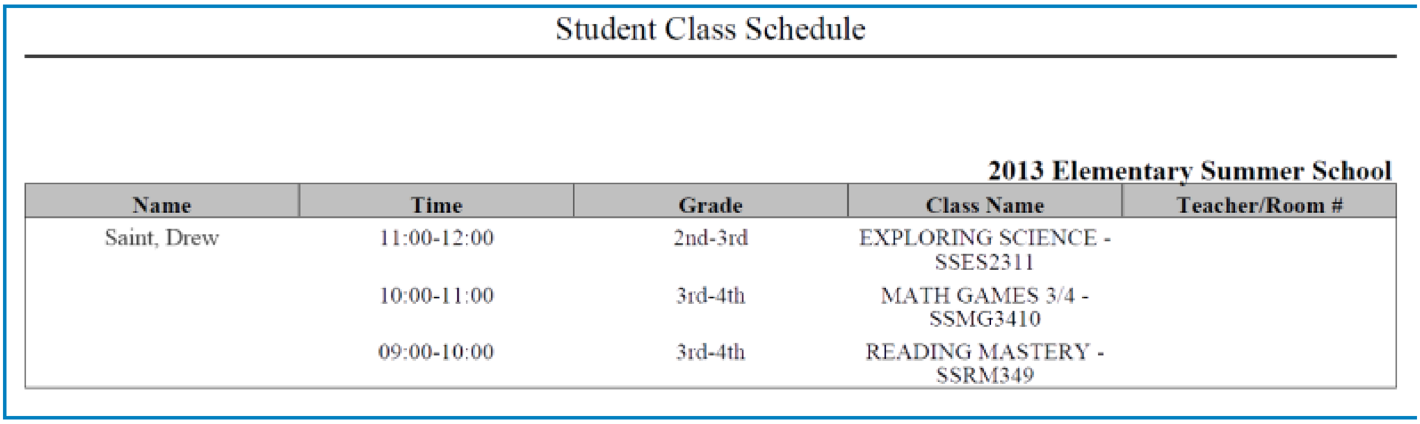
From Date: 03/13/2018

To Date: 01/27/2018

Child Id:

Family Id:

Report Example-



Student Class Schedule

2013 Elementary Summer School

Name	Time	Grade	Class Name	Teacher/Room #
Saint, Drew	11:00-12:00	2nd-3rd	EXPLORING SCIENCE - SSES2311	
	10:00-11:00	3rd-4th	MATH GAMES 3/4 - SSMG3410	
	09:00-10:00	3rd-4th	READING MASTERY - SSRM349	

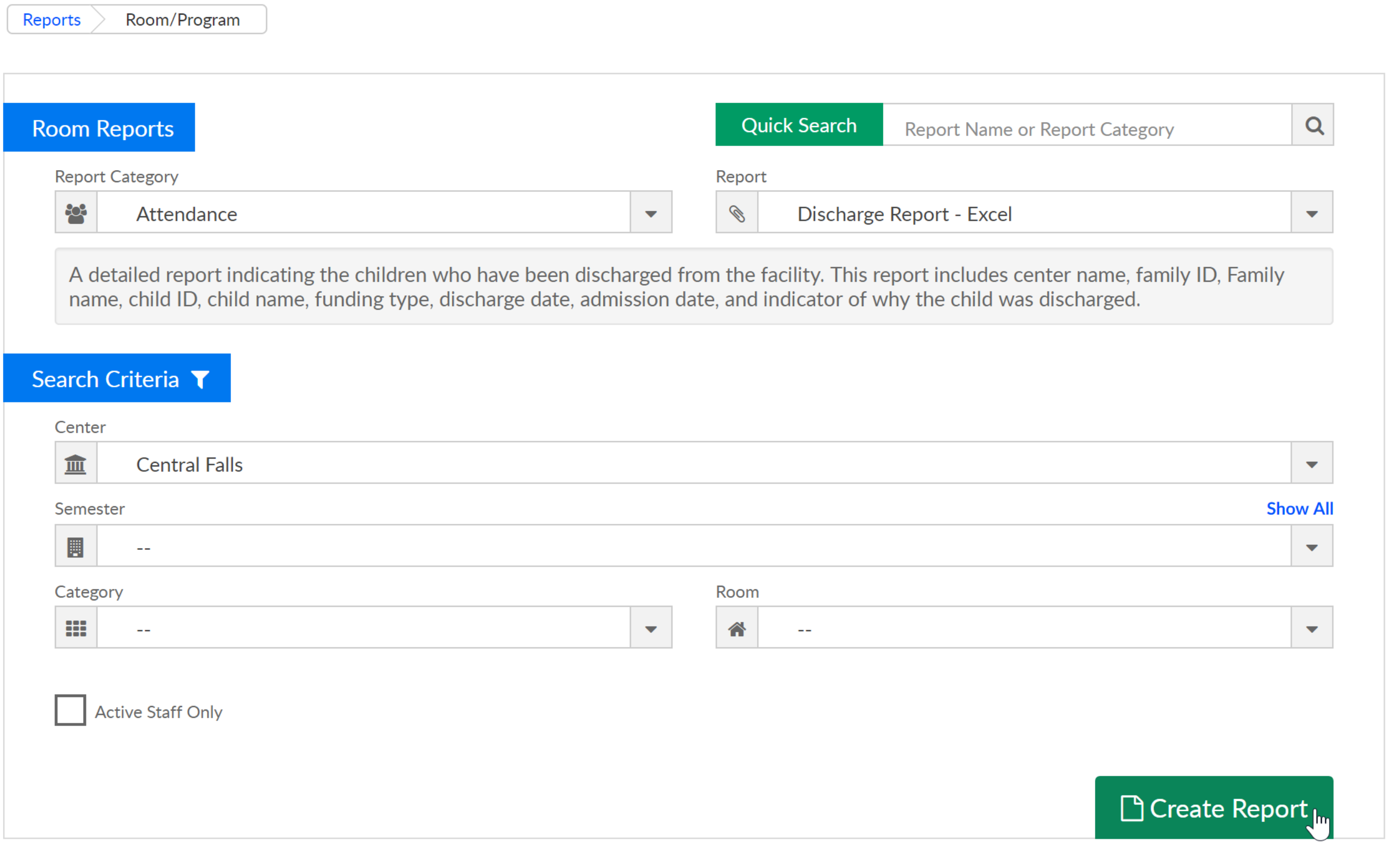
Attendance- Discharge Report - Excel (Activity ID 406)

Last Modified on 05/29/2018 3:09 pm EDT

The Discharge Report displays students who have been discharged for a site/facilitiy. This is a detailed report indicating the children who have been discharged from the facility.

This report includes center name, family ID, Family name, child ID, child name, funding type, discharge date, admission date, and indicator of why the child was discharged.

- Center Name: The name of the facility the child is enrolled within.
- Family ID: The identification number assigned to the family.
- Family Name: The name of the family within the Platform.
- Child ID: The identification number assigned to the child.
- Child First Name: The first name of the child.
- Child Last Name: The last name of the child.
- Funding Type: The third party funding sponsor assigned to the child.
- Discharge Date: The date the child was discharged from the facility.
- Admission Date: The date the child was admitted into the facility.
- Indicator: The reason the child was discharged from the facility.



Report Category: Attendance

Report: Discharge Report - Excel

A detailed report indicating the children who have been discharged from the facility. This report includes center name, family ID, Family name, child ID, child name, funding type, discharge date, admission date, and indicator of why the child was discharged.

Center: Central Falls

Semester: --

Category: --

Room: --

☐ Active Staff Only

Example Report-

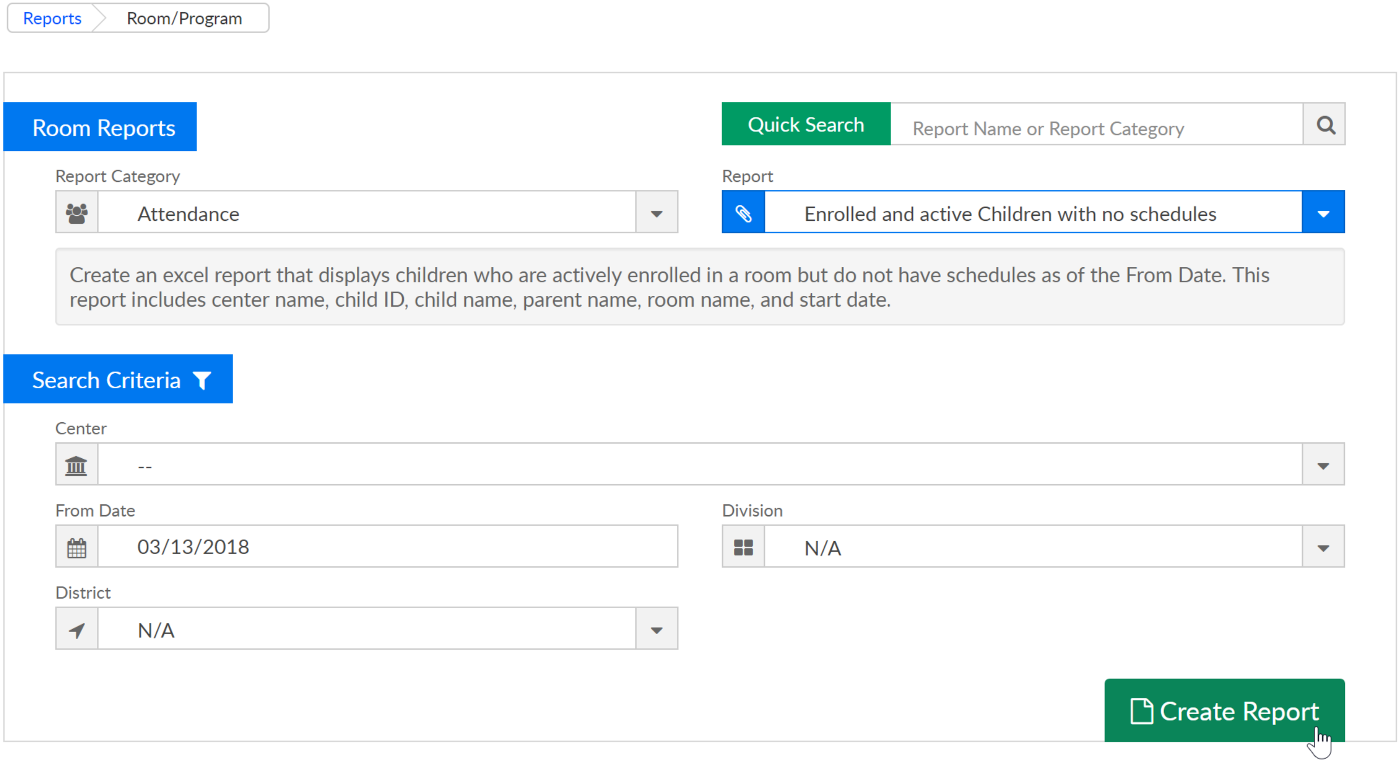
Center Name	Family ID	Family Name	Child ID	Child First Name	Child Last Name	Funding Type	Discharge Date	Admission Date	Indicator
Central Falls	215549	BUSD - SAIS	276089	mary	angel		11/17/2016	11/30/2016	Scheduled After Discharge.
Central Falls	215549	BUSD - SAIS	276089	mary	angel		11/17/2016	11/30/2016	Scheduled After Discharge.
Central Falls	23516	Martin Family	303559	TestWithdraw2	martin		01/04/2017	06/13/2018	Scheduled After Discharge.
Central Falls	23516	Martin Family	303559	TestWithdraw2	martin		01/04/2017	06/13/2018	Scheduled After Discharge.
Cirrus Group LLC	23527	Fish Family	29648	Withdrawn	Fish		07/01/2014	12/31/9999	Scheduled After Discharge.
Cirrus Group LLC	23527	Fish Family	29648	Withdrawn	Fish		07/01/2014	12/31/9999	Scheduled After Discharge.

Attendance- Enrolled and active Children with no schedules (Activity ID 1563)

Last Modified on 05/29/2018 3:12 pm EDT

An excel report that displays children who are actively enrolled in a room but do not have schedules (scheduled days of the week) as of the From Date.

This report includes center name, child ID, child name, parent name, room name, and start date.



Report Category: Attendance

Report: Enrolled and active Children with no schedules

Create an excel report that displays children who are actively enrolled in a room but do not have schedules as of the From Date. This report includes center name, child ID, child name, parent name, room name, and start date.

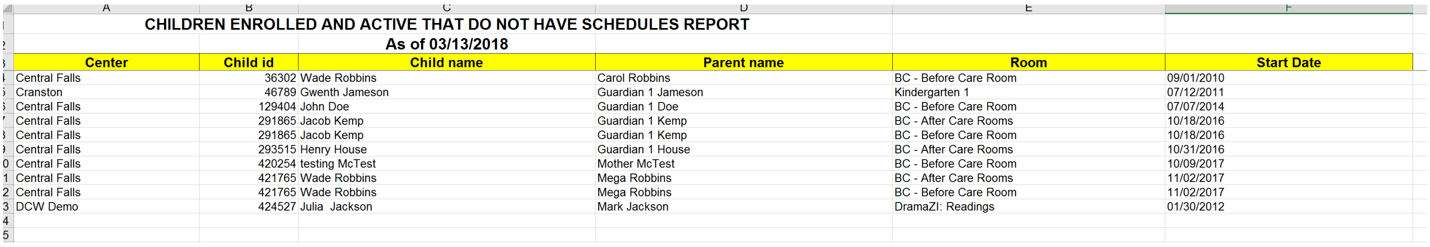
Center: --

From Date: 03/13/2018

Division: N/A

District: N/A

Example report-



CHILDREN ENROLLED AND ACTIVE THAT DO NOT HAVE SCHEDULES REPORT

As of 03/13/2018

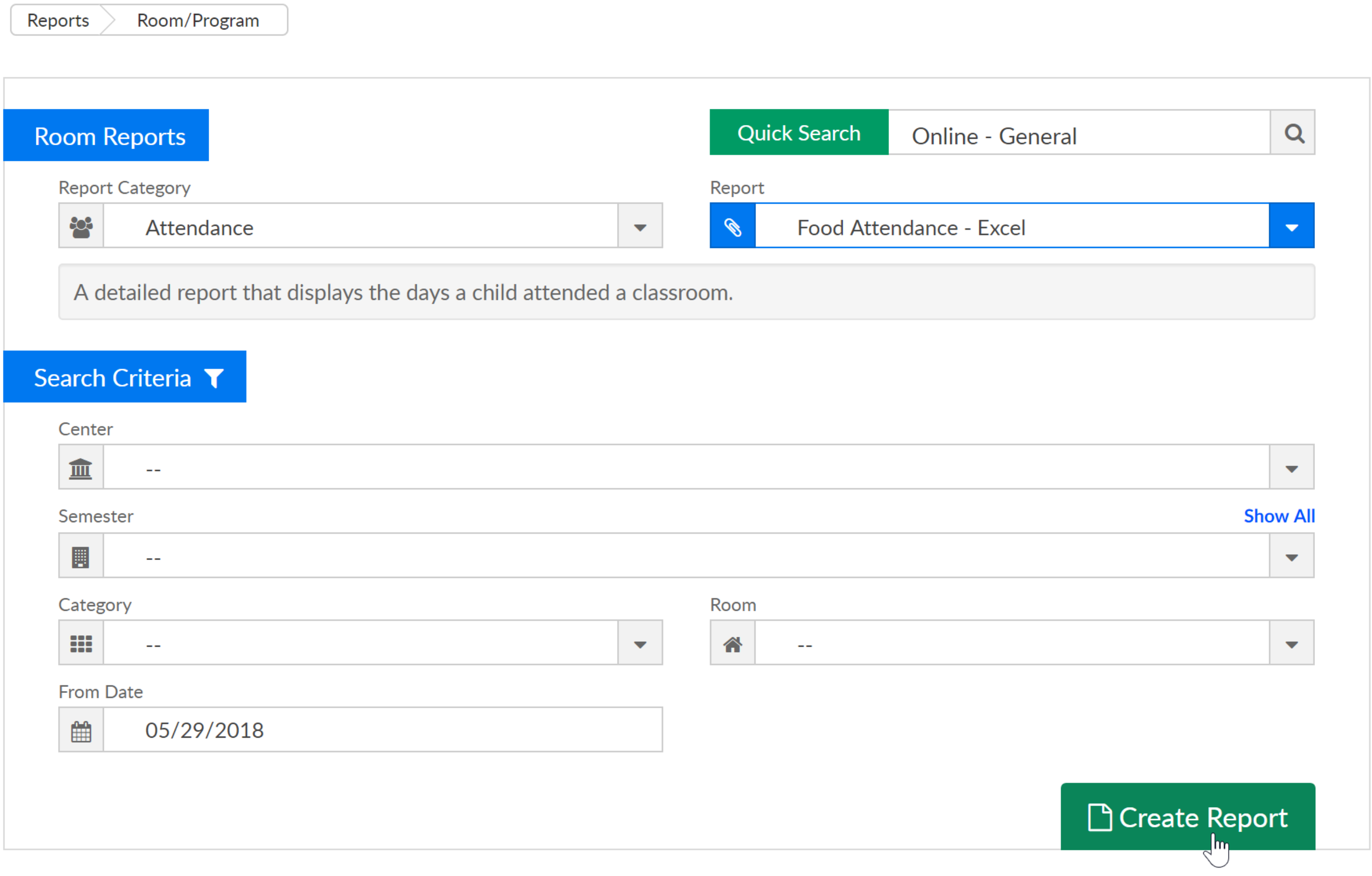
Center	Child id	Child name	Parent name	Room	Start Date
Central Falls	36302	Wade Robbins	Carol Robbins	BC - Before Care Room	09/01/2010
Cranston	46789	Gwenth Jameson	Guardian 1 Jameson	Kindergarten 1	07/12/2011
Central Falls	129404	John Doe	Guardian 1 Doe	BC - Before Care Room	07/07/2014
Central Falls	291865	Jacob Kemp	Guardian 1 Kemp	BC - After Care Rooms	10/18/2016
Central Falls	291865	Jacob Kemp	Guardian 1 Kemp	BC - Before Care Room	10/18/2016
Central Falls	293515	Henry House	Guardian 1 House	BC - After Care Rooms	10/31/2016
Central Falls	420254	testing McTest	Mother McTest	BC - Before Care Room	10/09/2017
Central Falls	421765	Wade Robbins	Mega Robbins	BC - After Care Rooms	11/02/2017
Central Falls	421765	Wade Robbins	Mega Robbins	BC - Before Care Room	11/02/2017
DCW Demo	424527	Julia Jackson	Mark Jackson	DramaZI: Readings	01/30/2012

Attendance- Food Attendance - Excel (Activity ID 711)

Last Modified on 05/29/2018 3:14 pm EDT

A detailed report that displays the days a child attended a classroom

- Center: The center identification number, name and state for the Food Attendance Report.
- DCW ID: The the Platform identification number for the child.
- Child First Name: The first name of the child.
- Child Last Name: The last name of the child.
- Parent First Name: The first name of the child's parent or guardian.
- Parent Last Name: The last name of the child's parent or guardian.
- Funding: The name of the third party sponsor assigned to the child.
- Room: The classroom or program assigned to the child.
- Days Per Week: The number of days the child attends the classroom per week.
- Age: The age of the child in years.
- District: The assigned district office for the child.
- 2 Apr 2012: This is a display of the child's status in the Platform.
- O indicates the child did not attend the classroom for the day.
- X indicates the child was present for the day.
- Total Days Attended: The total number of days the child attended for the month. This report is a month report, however the photo only displays a condensed version of the report.



Room Reports

Online - General

Report Category: Attendance

Report: Food Attendance - Excel

A detailed report that displays the days a child attended a classroom.

Search Criteria

Center: --

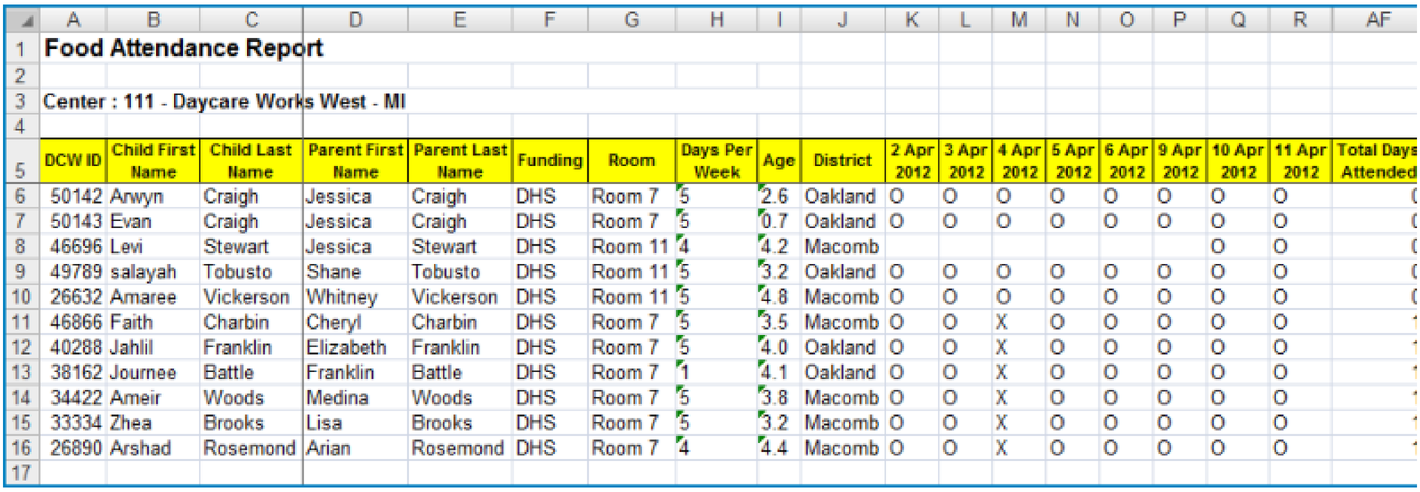
Semester: --

Category: --

Room: --

From Date: 05/29/2018

Example Report-



Food Attendance Report

Center : 111 - Daycare Works West - MI

DCW ID	Child First Name	Child Last Name	Parent First Name	Parent Last Name	Funding	Room	Days Per Week	Age	District	2 Apr 2012	3 Apr 2012	4 Apr 2012	5 Apr 2012	6 Apr 2012	9 Apr 2012	10 Apr 2012	11 Apr 2012	Total Days Attended
50142	Arwyn	Craigh	Jessica	Craigh	DHS	Room 7	5	2.6	Oakland	O	O	O	O	O	O	O	O	
50143	Evan	Craigh	Jessica	Craigh	DHS	Room 7	5	0.7	Oakland	O	O	O	O	O	O	O	O	
46696	Levi	Stewart	Jessica	Stewart	DHS	Room 11	4	4.2	Macomb							O	O	
49789	salayah	Tobusto	Shane	Tobusto	DHS	Room 11	5	3.2	Oakland	O	O	O	O	O	O	O	O	
26632	Amaree	Vickerson	Whitney	Vickerson	DHS	Room 11	5	4.8	Macomb	O	O	O	O	O	O	O	O	
46866	Faith	Charbin	Cheryl	Charbin	DHS	Room 7	5	3.5	Macomb	O	O	X	O	O	O	O	O	
40288	Jahlil	Franklin	Elizabeth	Franklin	DHS	Room 7	5	4.0	Oakland	O	O	X	O	O	O	O	O	
38162	Journee	Battle	Franklin	Battle	DHS	Room 7	1	4.1	Oakland	O	O	X	O	O	O	O	O	
34422	Ameir	Woods	Medina	Woods	DHS	Room 7	5	3.8	Macomb	O	O	X	O	O	O	O	O	
33334	Zhea	Brooks	Lisa	Brooks	DHS	Room 7	5	3.2	Macomb	O	O	X	O	O	O	O	O	
26890	Arshad	Rosemond	Arian	Rosemond	DHS	Room 7	4	4.4	Macomb	O	O	X	O	O	O	O	O	

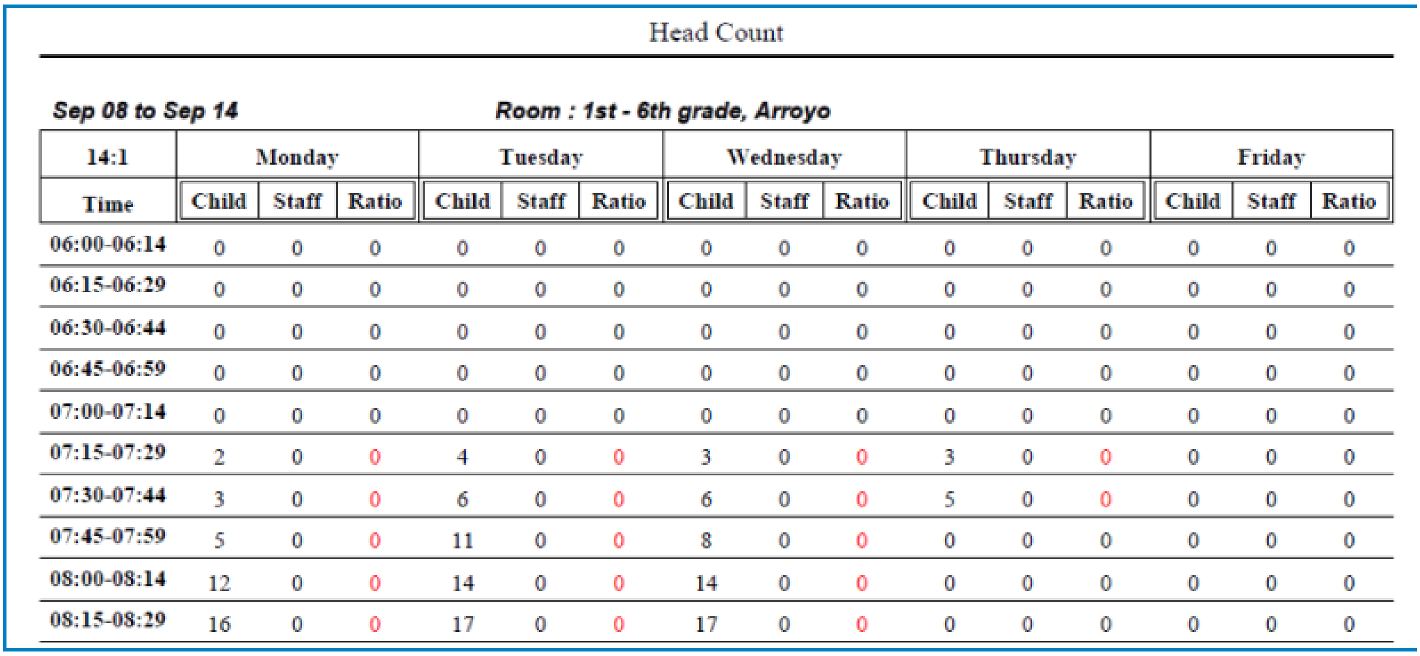
Attendance- Head Count - PDF (Activity ID 563)

Last Modified on 05/29/2018 3:26 pm EDT

A head count roster for a facility; including children and staff members throughout a specific day by room/program.

- Date: The week range for the head count report.
- Room: The name of the classroom.
- 4:1: The required ratio for the classroom.
- Monday/ Tuesday/ Wednesday/ Thursday/ Friday: The date for the head count ratio.
- Time: The time for the head count ratio.
- Child: The number of children in the classroom for the time.
- Staff: The number of staff members in the classroom for the time.
- Ratio: The ratio of children to staff members in the facility.

Report example-



Head Count

Sep 08 to Sep 14 ***Room : 1st - 6th grade, Arroyo***

14:1	Monday			Tuesday			Wednesday			Thursday			Friday		
Time	**Child**	**Staff**	**Ratio**	**Child**	**Staff**	**Ratio**	**Child**	**Staff**	**Ratio**	**Child**	**Staff**	**Ratio**	**Child**	**Staff**	**Ratio**
06:00-06:14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
06:15-06:29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
06:30-06:44	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
06:45-06:59	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
07:00-07:14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
07:15-07:29	2	0	0	4	0	0	3	0	0	3	0	0	0	0	0
07:30-07:44	3	0	0	6	0	0	6	0	0	5	0	0	0	0	0
07:45-07:59	5	0	0	11	0	0	8	0	0	0	0	0	0	0	0
08:00-08:14	12	0	0	14	0	0	14	0	0	0	0	0	0	0	0
08:15-08:29	16	0	0	17	0	0	17	0	0	0	0	0	0	0	0

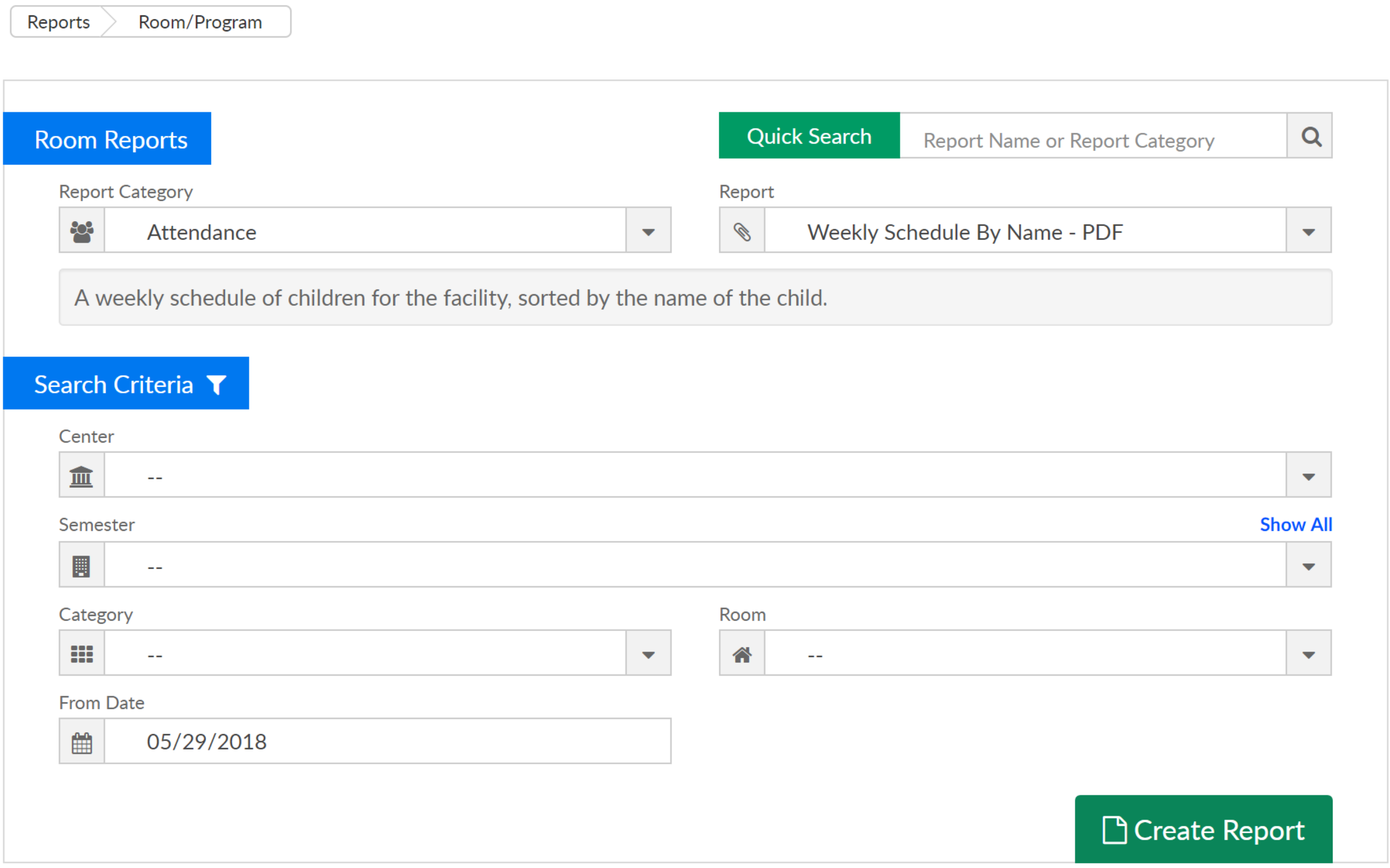
Attendance- Weekly Schedule By Name - PDF (Activity ID 561)

Last Modified on 05/29/2018 3:58 pm EDT

A weekly schedule of children for the facility, sorted by the grade.

- Date Range: The time span for the weekly child schedule by grade report.
- DCW - North Center Two: The name of the facility for the weekly child schedule by grade report.
- Before And After center: The name of the classroom for the weekly child schedule.
- Last Name: The last name of the child.
- First Name: The first name of the child.
- Grade: The grade the child is enrolled in the facility.
- Monday/Tuesday/Wednesday/Thursday/Friday: The days of the week the child attends the facility. If the child is scheduled to attend the facility for the day, a 1 will be displayed in the day column.

Tips: Use search criteria to limit the students that will display. Leave the center set to -- to pull for all sites.



Report Category: Attendance

Report: Weekly Schedule By Name - PDF

A weekly schedule of children for the facility, sorted by the name of the child.

Center: --

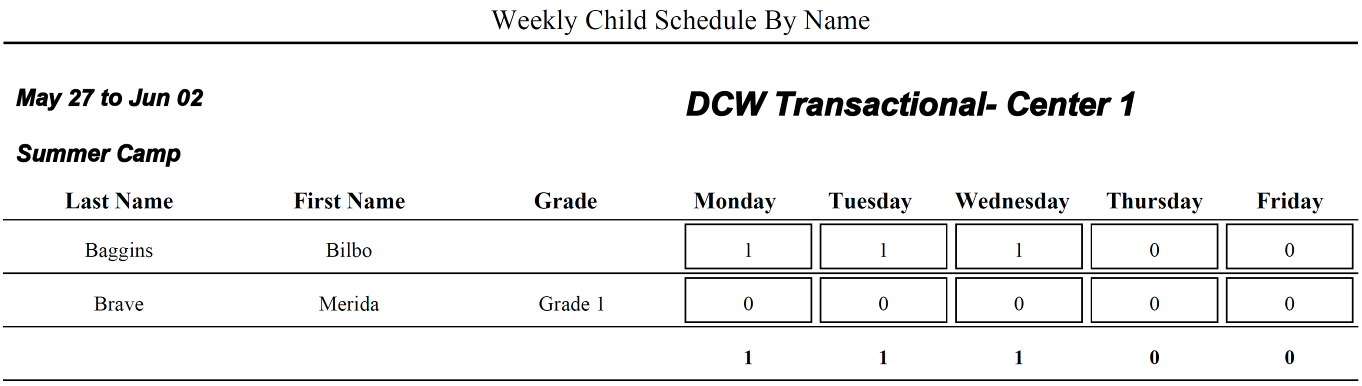
Semester: --

Category: --

Room: --

From Date: 05/29/2018

Report Example-



Weekly Child Schedule By Name

May 27 to Jun 02

DCW Transactional- Center 1

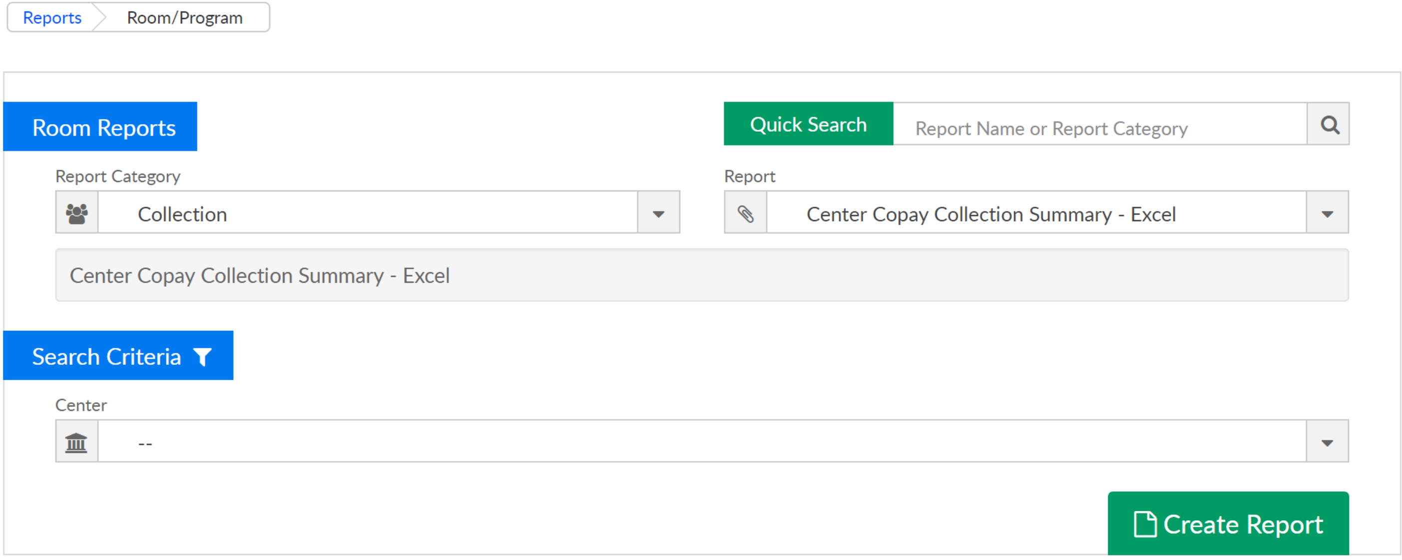
Summer Camp

Last Name	First Name	Grade	Monday	Tuesday	Wednesday	Thursday	Friday
Baggins	Bilbo		1	1	1	0	0
Brave	Merida	Grade 1	0	0	0	0	0
			1	**1**	**1**	**0**	**0**

Collection- Center Copay Collection Summary - Excel

Last Modified on 03/13/2018 3:01 pm EDT

The Center Copay Collection Summary report displays families that have copays in the system.



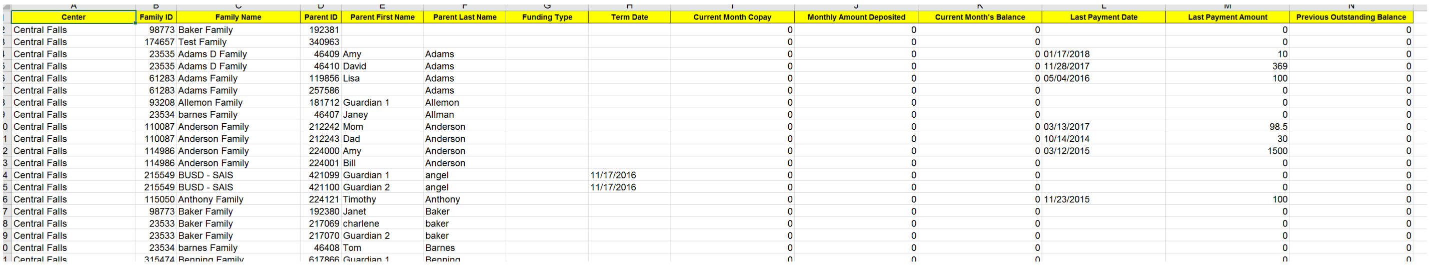
Report Category: Collection

Report: Center Copay Collection Summary - Excel

Center Copay Collection Summary - Excel

Center: --

Report example-



Center	Family ID	Family Name	Parent ID	Parent First Name	Parent Last Name	Funding Type	Term Date	Current Month Copay	Monthly Amount Deposited	Current Month's Balance	Last Payment Date	Last Payment Amount	Previous Outstanding Balance
Central Falls	98773	Baker Family	192381					0	0	0		0	0
Central Falls	174657	Test Family	340963					0	0	0		0	0
Central Falls	23535	Adams D Family	46409	Amy	Adams			0	0	0	01/17/2018	10	0
Central Falls	23535	Adams D Family	46410	David	Adams			0	0	0	11/28/2017	369	0
Central Falls	61283	Adams Family	119856	Lisa	Adams			0	0	0	05/04/2016	100	0
Central Falls	61283	Adams Family	257586		Adams			0	0	0		0	0
Central Falls	93208	Allemon Family	181712	Guardian 1	Allemon			0	0	0		0	0
Central Falls	23534	barnes Family	46407	Janey	Allman			0	0	0		0	0
Central Falls	110087	Anderson Family	212242	Mom	Anderson			0	0	0	03/13/2017	98.5	0
Central Falls	110087	Anderson Family	212243	Dad	Anderson			0	0	0	10/14/2014	30	0
Central Falls	114986	Anderson Family	224000	Amy	Anderson			0	0	0	03/12/2015	1500	0
Central Falls	114986	Anderson Family	224001	Bill	Anderson			0	0	0		0	0
Central Falls	215549	BUSD - SAIS	421099	Guardian 1	angel		11/17/2016	0	0	0		0	0
Central Falls	215549	BUSD - SAIS	421100	Guardian 2	angel		11/17/2016	0	0	0		0	0
Central Falls	115050	Anthony Family	224121	Timothy	Anthony			0	0	0	11/23/2015	100	0
Central Falls	98773	Baker Family	192380	Janet	Baker			0	0	0		0	0
Central Falls	23533	Baker Family	217069	charlene	baker			0	0	0		0	0
Central Falls	23533	Baker Family	217070	Guardian 2	baker			0	0	0		0	0
Central Falls	23534	barnes Family	46408	Tom	Barnes			0	0	0		0	0
Central Falls	315474	Benning Family	617866	Guardian 1	Benning			0	0	0		0	0

Fields-

Center: The name of the facility the child is enrolled within.

Family ID: The identification number assigned to the family.

Family Name: The name of the family within the Platform.

Parent ID: The identification number assigned to the parent or legal guardian.

Parent Last Name: The last name of the parent or legal guardian.

Funding Type: The third party sponsor assigned to the family.

Term Date: The date the family was terminated from the facility.

Current Month Copay: The current monthly co-payment assigned to the family.

Monthly Amount Deposited: The amount deposited by the family for the month.

Current Month's Balance: The current month balance for the family.

Last Payment Date: The date the family last made a payment to the facility.

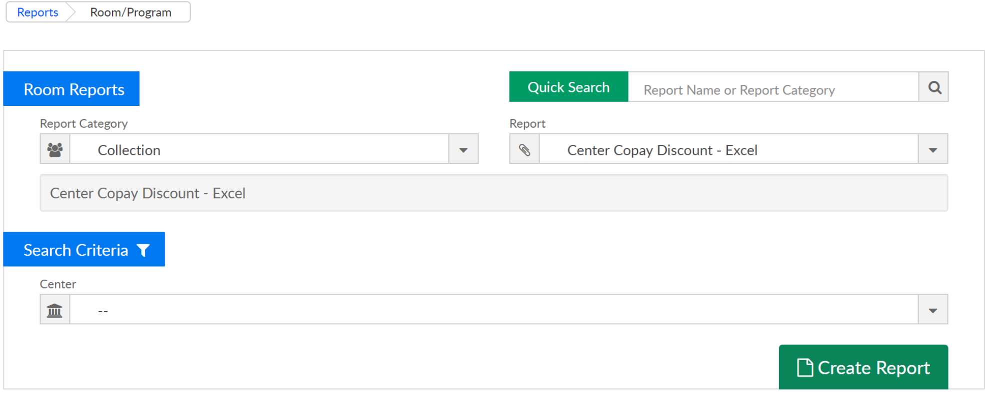
Last Payment Amount: The total amount of the last payment made to the facility.

Previous Outstanding Balance: The previous outstanding balance for the family.

Collection- Center Copay Discount - Excel

Last Modified on 03/13/2018 3:06 pm EDT

The Center Copay Discount report is a detailed report of the co-payment discount provided for a facility.



Reports > Room/Program

Room Reports

Quick Search: Report Name or Report Category

Report Category: Collection

Report: Center Copay Discount - Excel

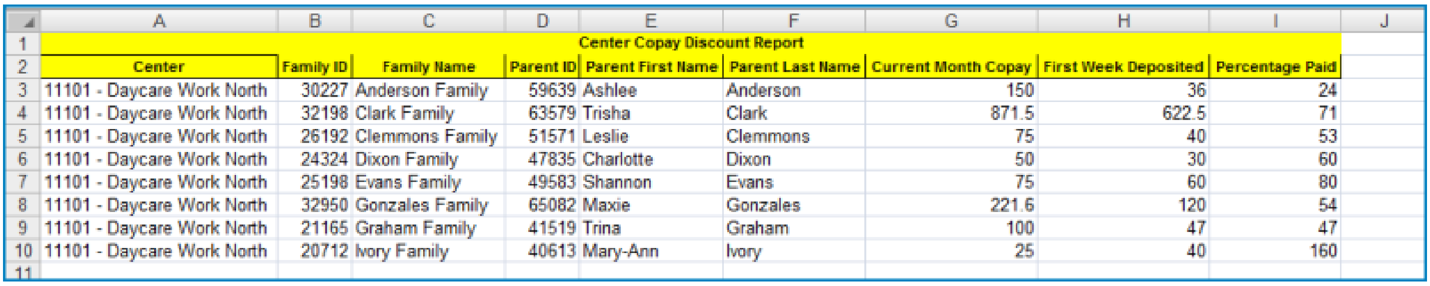
Center Copay Discount - Excel

Search Criteria

Center: --

Create Report

Example Report-



Center Copay Discount Report

Center	Family ID	Family Name	Parent ID	Parent First Name	Parent Last Name	Current Month Copay	First Week Deposited	Percentage Paid
11101 - Daycare Work North	30227	Anderson Family	59639	Ashlee	Anderson	150	36	24
11101 - Daycare Work North	32198	Clark Family	63579	Trisha	Clark	871.5	622.5	71
11101 - Daycare Work North	26192	Clemmons Family	51571	Leslie	Clemmons	75	40	53
11101 - Daycare Work North	24324	Dixon Family	47835	Charlotte	Dixon	50	30	60
11101 - Daycare Work North	25198	Evans Family	49583	Shannon	Evans	75	60	80
11101 - Daycare Work North	32950	Gonzales Family	65082	Maxie	Gonzales	221.6	120	54
11101 - Daycare Work North	21165	Graham Family	41519	Trina	Graham	100	47	47
11101 - Daycare Work North	20712	Ivory Family	40613	Mary-Ann	Ivory	25	40	160

Fields-

Center: The name of the facility.

Family ID: The identification number assigned to the family.

Family Name: The name of the family within the Platform.

Parent ID: The identification number assigned to the parent or legal guardian for the family.

Parent First Name: The first name of the parent or legal guardian.

Parent Last Name: The last name of the parent or legal guardian.

Current Month Copay: The current monthly co-payment assigned to the parent or legal guardian.

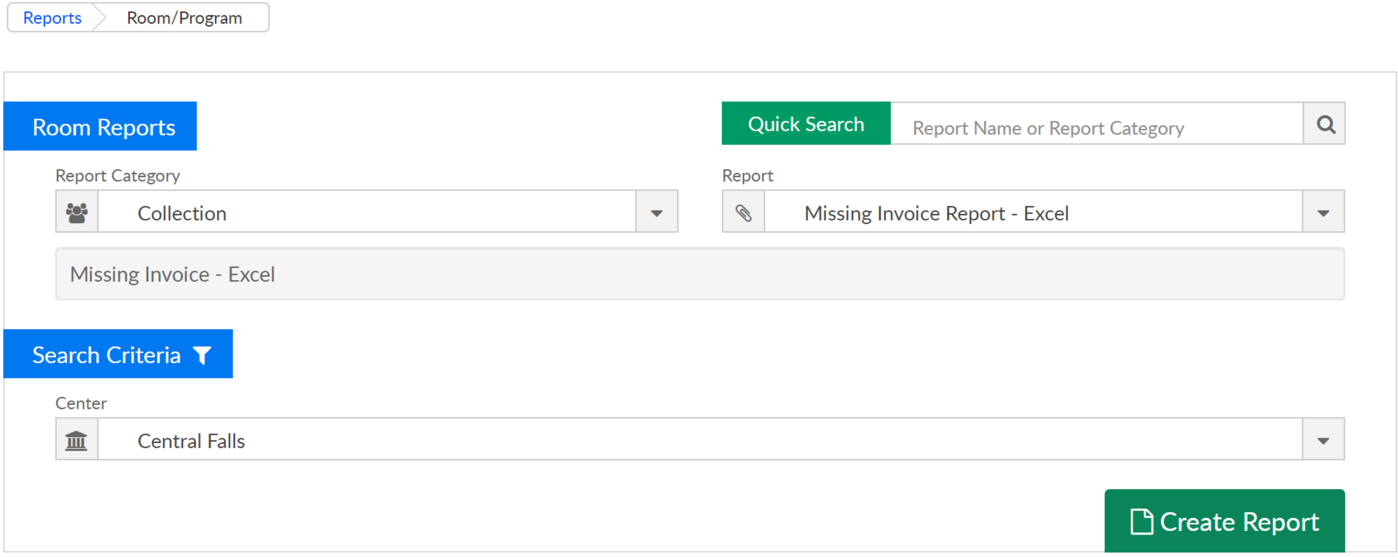
First Week Deposited: The total amount deposited by the parent or legal guardian.

Percentage Paid: The percentage paid for the co-payment.

Collection- Missing Invoice Report - Excel

Last Modified on 03/13/2018 3:15 pm EDT

A report of the missing invoices from a facility.



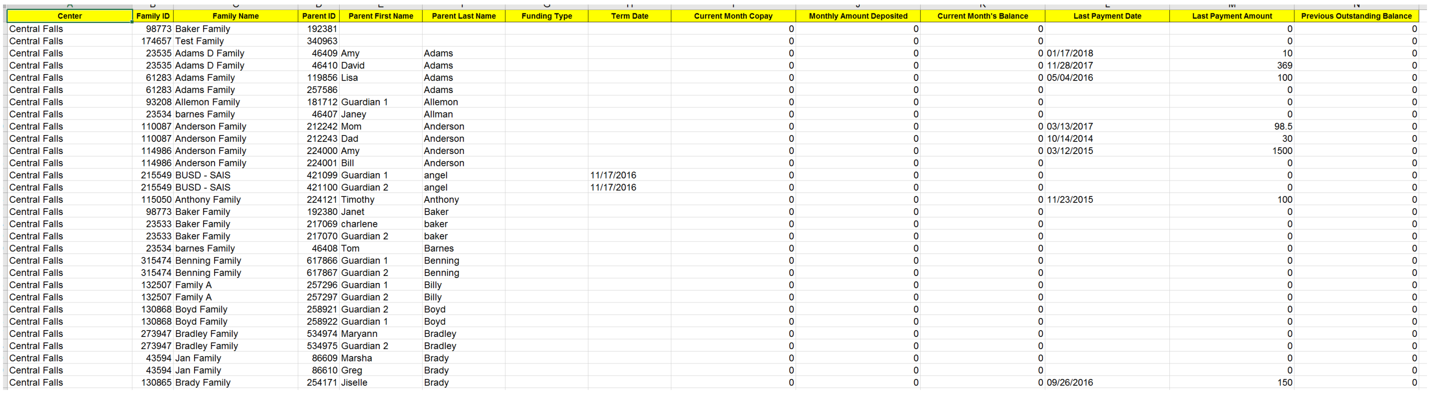
Report Category: Collection

Report: Missing Invoice Report - Excel

Missing Invoice - Excel

Center: Central Falls

Example Report-



Center	Family ID	Family Name	Parent ID	Parent First Name	Parent Last Name	Funding Type	Term Date	Current Month Copay	Monthly Amount Deposited	Current Month's Balance	Last Payment Date	Last Payment Amount	Previous Outstanding Balance
Central Falls	98773	Baker Family	192381					0	0	0		0	0
Central Falls	174657	Test Family	340963					0	0	0		0	0
Central Falls	23535	Adams D Family	46409	Amy	Adams			0	0	0	01/17/2018	10	0
Central Falls	23535	Adams D Family	46410	David	Adams			0	0	0	11/28/2017	369	0
Central Falls	61283	Adams Family	119856	Lisa	Adams			0	0	0	05/04/2016	100	0
Central Falls	61283	Adams Family	257586		Adams			0	0	0		0	0
Central Falls	93208	Allemon Family	181712	Guardian 1	Allemon			0	0	0		0	0
Central Falls	23534	barnes Family	46407	Janey	Allman			0	0	0		0	0
Central Falls	110087	Anderson Family	212242	Mom	Anderson			0	0	0	03/13/2017	98.5	0
Central Falls	110087	Anderson Family	212243	Dad	Anderson			0	0	0	10/14/2014	30	0
Central Falls	114986	Anderson Family	224000	Amy	Anderson			0	0	0	03/12/2015	1500	0
Central Falls	114986	Anderson Family	224001	Bill	Anderson			0	0	0		0	0
Central Falls	215549	BUSD - SAIS	421099	Guardian 1	angel		11/17/2016	0	0	0		0	0
Central Falls	215549	BUSD - SAIS	421100	Guardian 2	angel		11/17/2016	0	0	0		0	0
Central Falls	115050	Anthony Family	224121	Timothy	Anthony			0	0	0	11/23/2015	100	0
Central Falls	98773	Baker Family	192380	Janet	Baker			0	0	0		0	0
Central Falls	23533	Baker Family	217069	charlene	baker			0	0	0		0	0
Central Falls	23533	Baker Family	217070	Guardian 2	baker			0	0	0		0	0
Central Falls	23534	barnes Family	46408	Tom	Barnes			0	0	0		0	0
Central Falls	315474	Benning Family	617866	Guardian 1	Benning			0	0	0		0	0
Central Falls	315474	Benning Family	617867	Guardian 2	Benning			0	0	0		0	0
Central Falls	132507	Family A	257296	Guardian 1	Billy			0	0	0		0	0
Central Falls	132507	Family A	257297	Guardian 2	Billy			0	0	0		0	0
Central Falls	130868	Boyd Family	258921	Guardian 2	Boyd			0	0	0		0	0
Central Falls	130868	Boyd Family	258922	Guardian 1	Boyd			0	0	0		0	0
Central Falls	273947	Bradley Family	534974	Maryann	Bradley			0	0	0		0	0
Central Falls	273947	Bradley Family	534975	Guardian 2	Bradley			0	0	0		0	0
Central Falls	43594	Jan Family	86609	Marsha	Brady			0	0	0		0	0
Central Falls	43594	Jan Family	86610	Greg	Brady			0	0	0		0	0
Central Falls	130865	Brady Family	254171	Jiselle	Brady			0	0	0	09/26/2016	150	0

Fields-

Center Name: The name of the facility within the Platform.

Statement ID: The identification number assigned to the billing statement.

Family ID: The identification number assigned to the family within the Platform.

Family Name: The name of the family within the Platform.

Statement Period Number: The assigned billing period for the billing statement.

Statement Period Year: The assigned billing period year for the billing statement.

Statement Begin Date: The date the billing statement started.

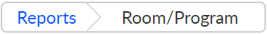
Statement End Date: The date the billing statement ends.

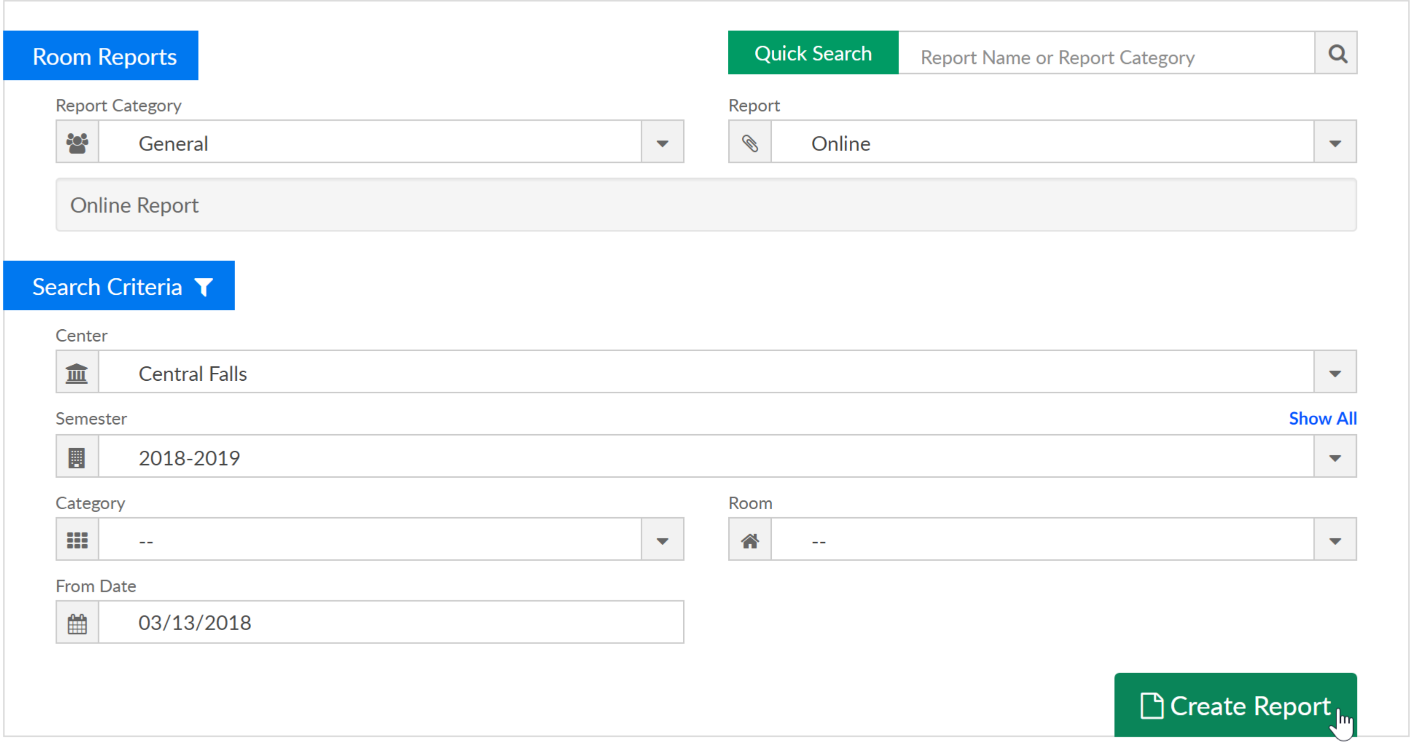
General- Online

Last Modified on 03/13/2018 3:26 pm EDT

The online report allows administrators the ability to view a roster of the children without creating a PDF or excel document.

Administrators can also charge fees to children from this report.





Report Category: General

Report: Online

Online Report

Center: Central Falls

Semester: 2018-2019

Category: --

Room: --

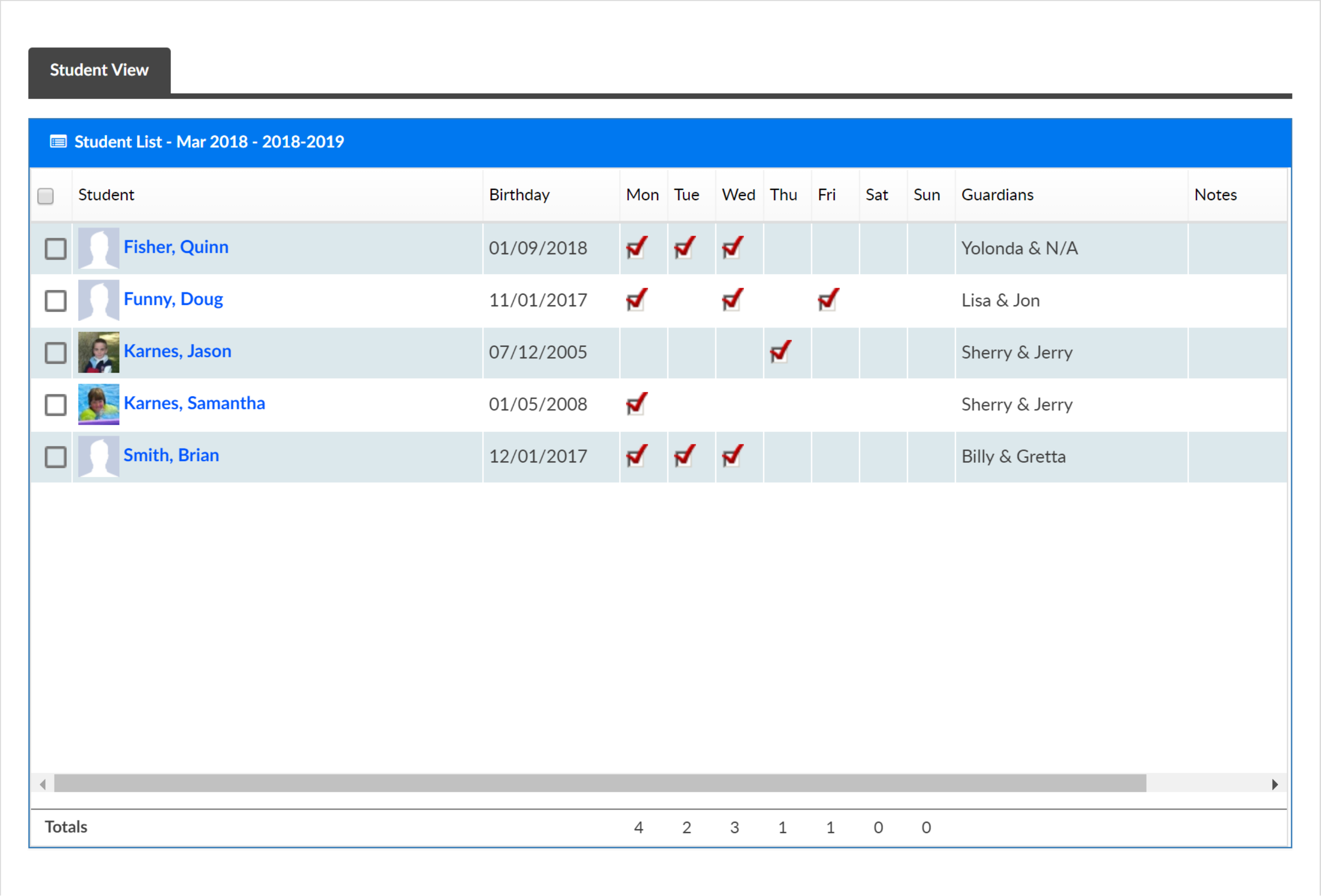
From Date: 03/13/2018

In order for this report to pull detail, Center and Semester, Category OR Room must be selected.

The From will pull as of the week that is incldued in the date.

For example, entering 3/13/18- will pull detail for the week from 3/12/18-3/16/18.

Students that match entered criteria will display in the Student View-

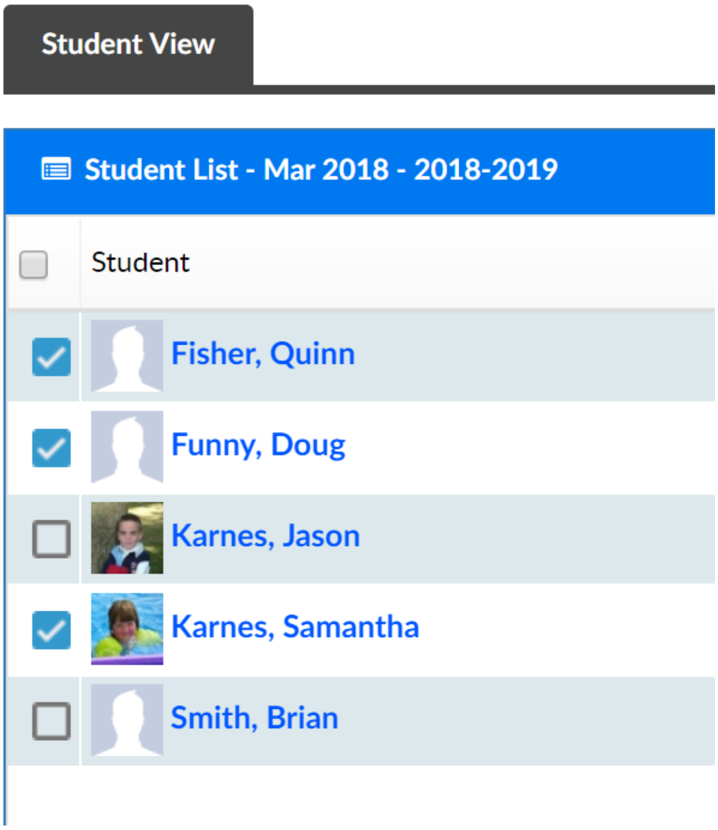


Student View

Student List - Mar 2018 - 2018-2019

☐	Student	Birthday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Guardians	Notes
☐	Fisher, Quinn	01/09/2018	✓	✓	✓					Yolonda & N/A	
☐	Funny, Doug	11/01/2017	✓		✓		✓			Lisa & Jon	
☐	Karnes, Jason	07/12/2005				✓				Sherry & Jerry	
☐	Karnes, Samantha	01/05/2008	✓							Sherry & Jerry	
☐	Smith, Brian	12/01/2017	✓	✓	✓					Billy & Gretta	
	Totals		4	2	3	1	1	0	0		

If you would like to add a fee to one or multiple children select the box to the left of a child's icon.



Student View

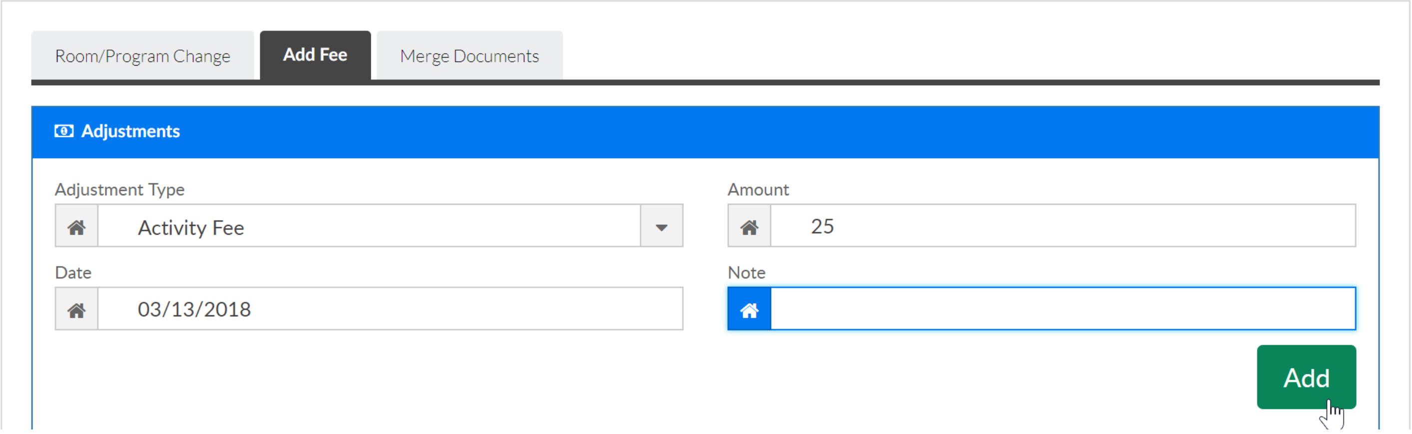
Student List - Mar 2018 - 2018-2019

☐	Student
☑	Fisher, Quinn
☑	Funny, Doug
☐	Karnes, Jason
☑	Karnes, Samantha
☐	Smith, Brian

Then scroll to the bottom of the page and select the Add Fee tab-

- Select the type of fee or adjustment you will be creating
- Enter the amount of the fee or adjustment
- Select the date the fee or adjustment should post as of
- Enter a note if desired

Then press Add.



Adjustment Type: Activity Fee

Amount: 25

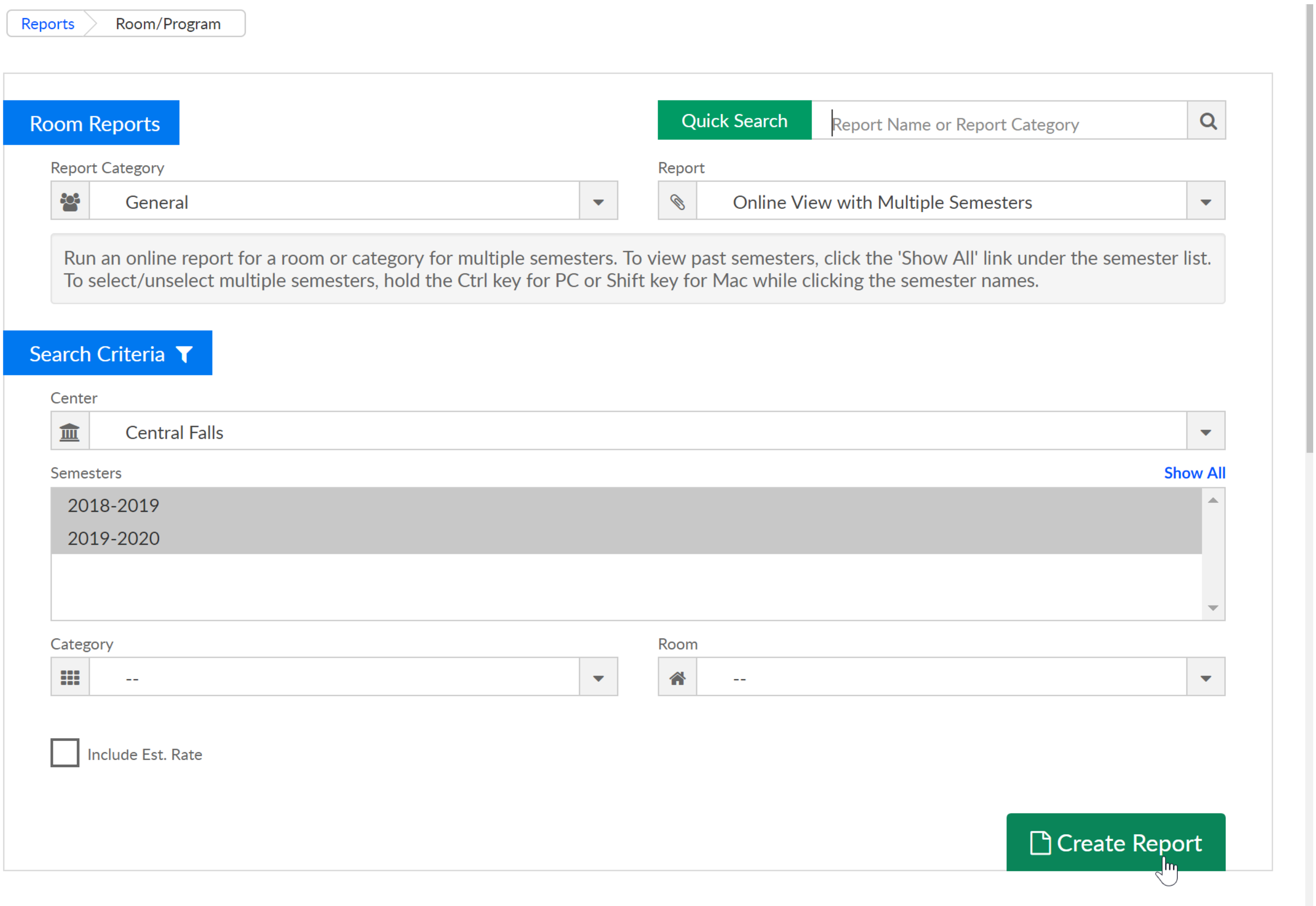
Date: 03/13/2018

Note:

General- Online View with Multiple Semesters

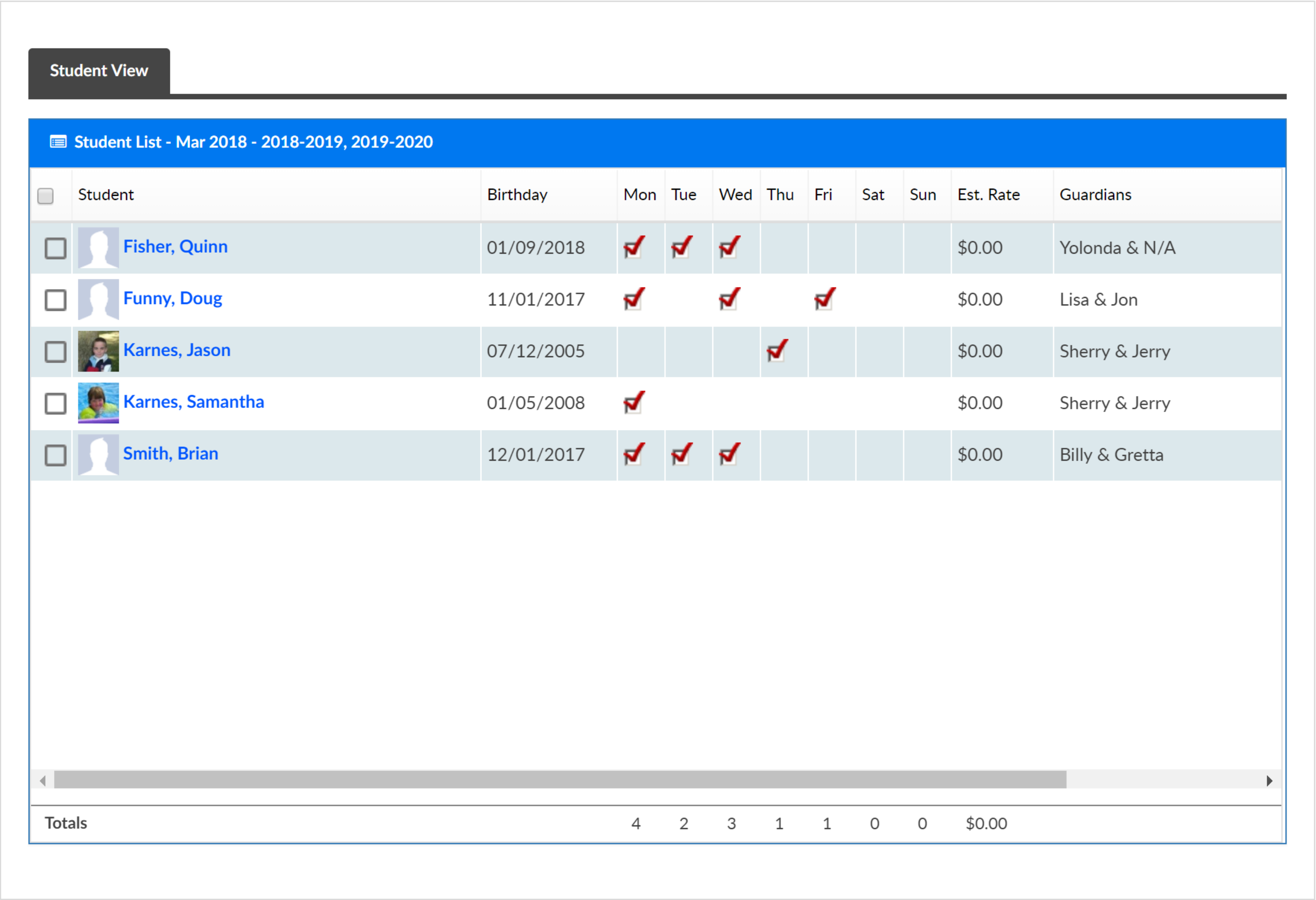
Last Modified on 03/13/2018 3:55 pm EDT

The Online View with Multiple Semesters report displays students by center, semseter selection category and room options. Check the Include Est Rate box to have the estimated cost display in line with the child.



Run an online report for a room or category for multiple semesters. To view past semesters, click the 'Show All' link under the semester list. To select/unselect multiple semesters, hold the Ctrl key for PC or Shift key for Mac while clicking the semester names.

Students that match search criteria will display.



Student View

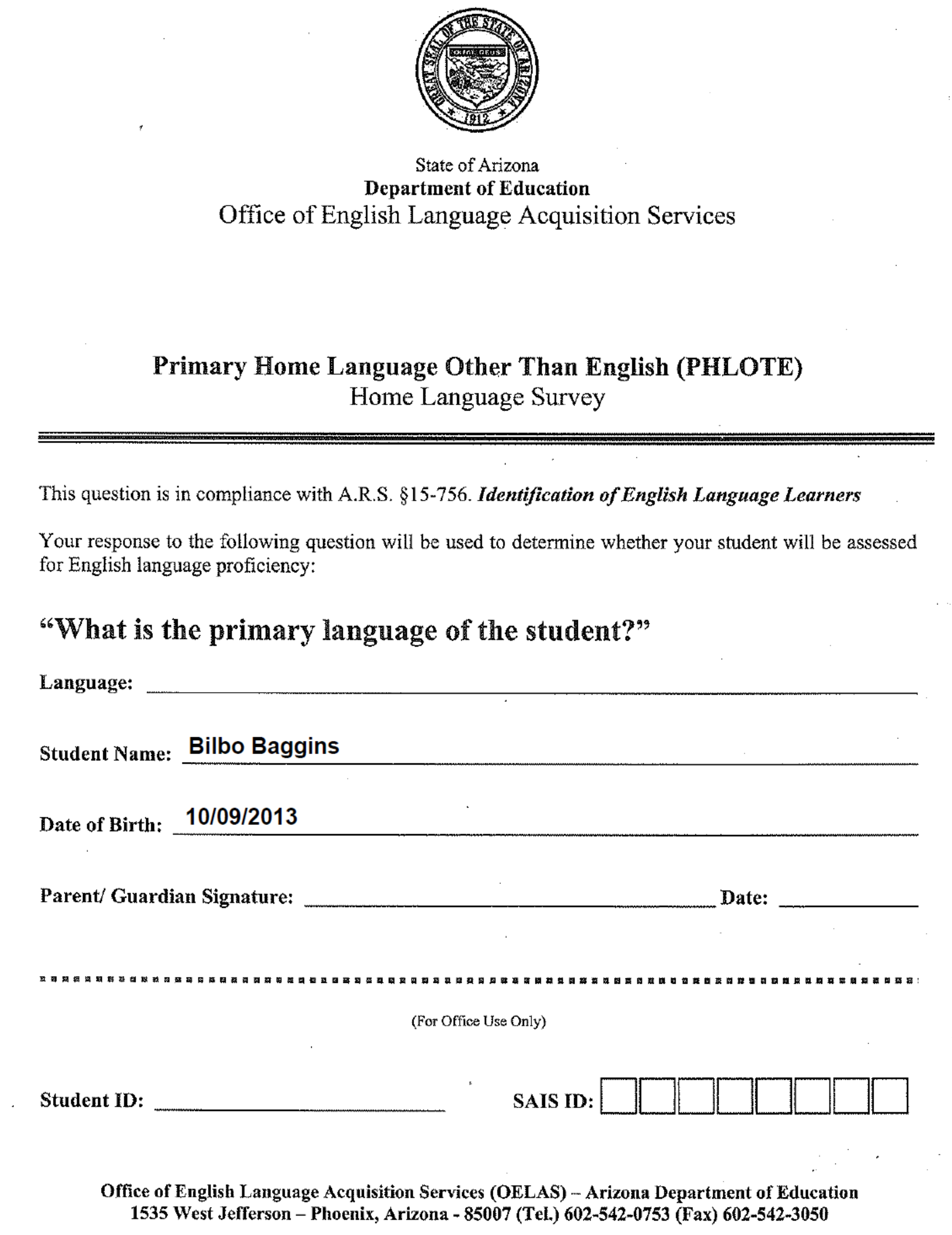
Student List - Mar 2018 - 2018-2019, 2019-2020

☐	Student	Birthday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Est. Rate	Guardians
☐	Fisher, Quinn	01/09/2018	✓	✓	✓					$0.00	Yolonda & N/A
☐	Funny, Doug	11/01/2017	✓		✓		✓			$0.00	Lisa & Jon
☐	Karnes, Jason	07/12/2005				✓				$0.00	Sherry & Jerry
☐	Karnes, Samantha	01/05/2008	✓							$0.00	Sherry & Jerry
☐	Smith, Brian	12/01/2017	✓	✓	✓					$0.00	Billy & Gretta
	Totals		4	2	3	1	1	0	0	$0.00	

Types of Merged Documents

Last Modified on 03/21/2018 9:44 am EDT

Phlote/PDF- For Arizona Only



1912

State of Arizona
Department of Education
Office of English Language Acquisition Services

Primary Home Language Other Than English (PHLOTE)
Home Language Survey

This question is in compliance with A.R.S. §15-756. ***Identification of English Language Learners***

Your response to the following question will be used to determine whether your student will be assessed for English language proficiency:

"What is the primary language of the student?"

Language:

Student Name: Bilbo Baggins

Date of Birth: 10/09/2013

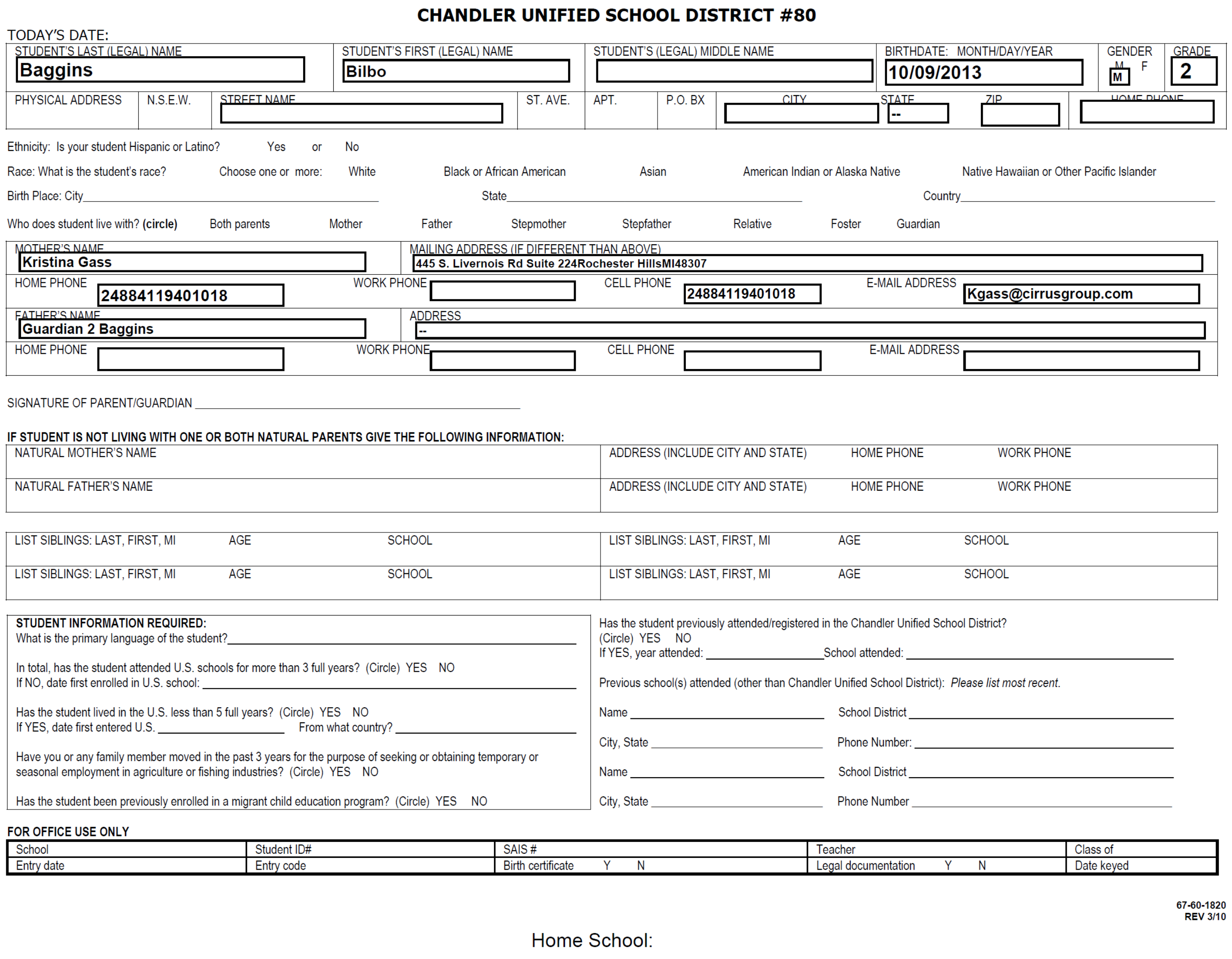
Parent/ Guardian Signature: **Date:**

(For Office Use Only)

Student ID: **SAIS ID:**

Office of English Language Acquisition Services (OELAS) – Arizona Department of Education
1535 West Jefferson – Phoenix, Arizona - 85007 (Tel.) 602-542-0753 (Fax) 602-542-3050

Enrollment Form/PDF- for Chandler school district only-



CHANDLER UNIFIED SCHOOL DISTRICT #80

TODAY'S DATE:

STUDENT'S LAST (LEGAL) NAME Baggins	STUDENT'S FIRST (LEGAL) NAME Bilbo	STUDENT'S (LEGAL) MIDDLE NAME	BIRTHDATE: MONTH/DAY/YEAR 10/09/2013	GENDER M F M	GRADE 2

PHYSICAL ADDRESS	N.S.E.W.	STREET NAME	ST. AVE.	APT.	P.O. BX	CITY	STATE --	ZIP	HOME PHONE

Ethnicity: Is your student Hispanic or Latino? Yes or No

Race: What is the student's race? Choose one or more: White Black or African American Asian American Indian or Alaska Native Native Hawaiian or Other Pacific Islander

Birth Place: City____________ State____________ Country____________

Who does student live with? **(circle)** Both parents Mother Father Stepmother Stepfather Relative Foster Guardian

MOTHER'S NAME Kristina Gass	MAILING ADDRESS (IF DIFFERENT THAN ABOVE) 445 S. Livernois Rd Suite 224Rochester HillsMI48307		
HOME PHONE 24884119401018	WORK PHONE	CELL PHONE 24884119401018	E-MAIL ADDRESS Kgass@cirrusgroup.com
FATHER'S NAME Guardian 2 Baggins	ADDRESS --		
HOME PHONE	WORK PHONE	CELL PHONE	E-MAIL ADDRESS

SIGNATURE OF PARENT/GUARDIAN ____________________

IF STUDENT IS NOT LIVING WITH ONE OR BOTH NATURAL PARENTS GIVE THE FOLLOWING INFORMATION:

NATURAL MOTHER'S NAME	ADDRESS (INCLUDE CITY AND STATE)	HOME PHONE	WORK PHONE
NATURAL FATHER'S NAME	ADDRESS (INCLUDE CITY AND STATE)	HOME PHONE	WORK PHONE

LIST SIBLINGS: LAST, FIRST, MI	AGE	SCHOOL	LIST SIBLINGS: LAST, FIRST, MI	AGE	SCHOOL
LIST SIBLINGS: LAST, FIRST, MI	AGE	SCHOOL	LIST SIBLINGS: LAST, FIRST, MI	AGE	SCHOOL

STUDENT INFORMATION REQUIRED:

What is the primary language of the student?____________

In total, has the student attended U.S. schools for more than 3 full years? (Circle) YES NO

If NO, date first enrolled in U.S. school: ____________

Has the student lived in the U.S. less than 5 full years? (Circle) YES NO

If YES, date first entered U.S. ________ From what country? ________

Have you or any family member moved in the past 3 years for the purpose of seeking or obtaining temporary or seasonal employment in agriculture or fishing industries? (Circle) YES NO

Has the student been previously enrolled in a migrant child education program? (Circle) YES NO

Has the student previously attended/registered in the Chandler Unified School District?

(Circle) YES NO

If YES, year attended: ________School attended: ________

Previous school(s) attended (other than Chandler Unified School District): *Please list most recent.*

Name ________ School District ________

City, State ________ Phone Number: ________

Name ________ School District ________

City, State ________ Phone Number ________

FOR OFFICE USE ONLY

School	Student ID#	SAIS #	Teacher	Class of
Entry date	Entry code	Birth certificate Y N	Legal documentation Y N	Date keyed

67-60-1820
REV 3/10

Home School:

Dynamic Form- this form will vary based on the state a site is located in.

CHILD INFORMATION RECORD

State of Michigan - Department of Licensing and Regulatory Affairs - Child Care Licensing

Instructions: Unless otherwise indicated, all requested information must be provided. If the information is not known or does not apply, “unknown” or “none” is the required response. A blank field, a line through a field or “N/A” are not acceptable responses.

For Provider Use Only:	Date of Admission	Date of Discharge

Name of Child (Last, First, Middle Initial) Baggins Bilbo			Child’s Date of Birth 10/09/2013
Address (Number and Street, Building/Apartment Number)	City	State --	Zip Code

Parent/Legal Guardian’s Name Gass, Kristina	Home Phone (24884119401018	Parent/Legal Guardian’s Name (Optional) Baggins, Guardian 2	Home Phone
Home Address (if not child’s address)	Cell Phone (24884119401018	Home Address (if not child’s address)	Cell Phone
City Rochester Hills	State MI	Zip Code 48307	
Email Address (optional) Kgass@cirrusgroup.com		Email Address	
Employer Name	Work Phone 24884119401018	Employer Name	Work Phone (

City	State	City	State --	Zip Code

Name of Child’s Physician or Health Clinic	Physician’s or Health Clinic’s Phone Number ( )
Hospital Preferred for Emergency Treatment (optional)	
Allergies, Special Needs and Special Instructions (Attach additional sheets, if necessary.) , N/A	

See Reverse Side

Emergency Contact & Release of Child: List all individuals,including parents/legal guardians, in order of preference, to be contacted in an emergency. If possible, include at least one person other than the parents/legal guardians to be contacted in an emergency and to whom the child can be released. The second phone number column can be left blank. (If more individuals, attach additional sheets.)

1.		
2.		
3.		

Release of Child Only: List all individuals, other than the parents/legal guardians, to whom the child may be released. (If more individuals, attach additional sheets.)

1.	(	2.	(
3.	(	4.	(

Parent/Legal Guardian Initials:

________ I give permission to DCW Transactional- Center 1, licensed by the Department of Licensing and Regulatory Affairs to secure emergency medical for the above named minor child while in care.

I certify that I accurately completed this form and if anything changes, I will notify the provider by updating this form.

Signature of Parent or Guardian ______________________ Date Signed __________

Date Card Reviewed	Parent or Legal Guardian Initials	Date Card Reviewed	Parent or Legal Guardian Initials	Date Card Reviewed	Parent or Legal Guardian Initials	Date Card Reviewed	Parent or Legal Guardian Initials

LARA is an equal opportunity employer/program.

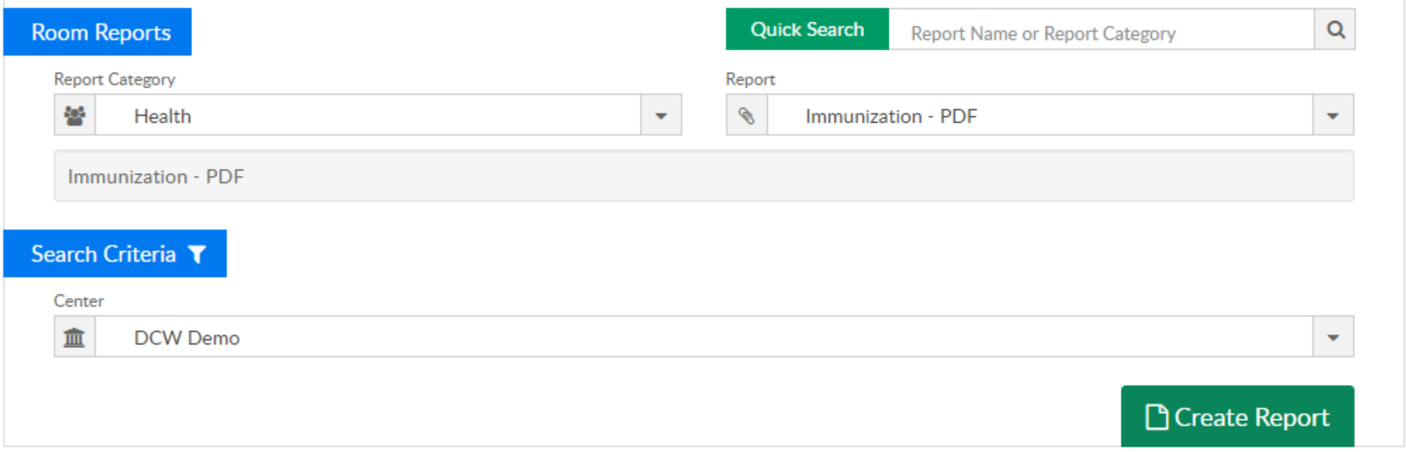
AUTHORITY: 1973 PA 116
COMPLETION: Required
PENALTY: Rule Violation

Health- Immunization - PDF

Last Modified on 10/24/2017 8:00 pm EDT

If you filter on the Center Level, the Immunization PDF report displays a list of children at the center with the dates that they were last immunized, organized by immunization type. Report can also be run at the Business Level to show information for children across all locations.

Required fields: Business Level or Center Level.

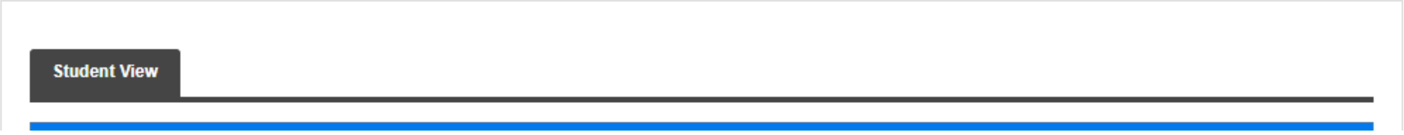


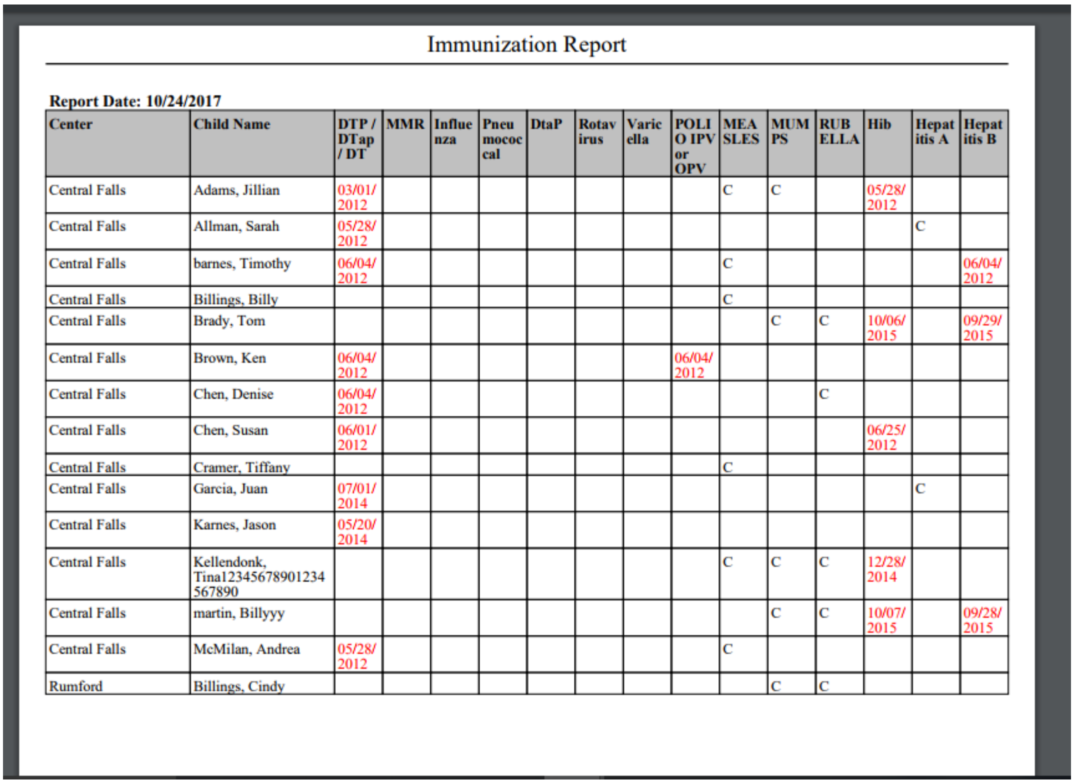
Report Category: Health

Report: Immunization - PDF

Immunization - PDF

Center: DCW Demo





Immunization Report

Report Date: 10/24/2017

Center	Child Name	DTP / DTap / DT	MMR	Influenza	Pneumococcal	DtaP	Rotavirus	Varicella	POLIO IPV or OPV	MEASLES	MUMPS	RUBELLA	Hib	Hepatitis A	Hepatitis B
Central Falls	Adams, Jillian	03/01/2012								C	C		05/28/2012		
Central Falls	Allman, Sarah	05/28/2012												C	
Central Falls	barnes, Timothy	06/04/2012								C					06/04/2012
Central Falls	Billings, Billy									C					
Central Falls	Brady, Tom										C	C	10/06/2015		09/29/2015
Central Falls	Brown, Ken	06/04/2012							06/04/2012						
Central Falls	Chen, Denise	06/04/2012										C			
Central Falls	Chen, Susan	06/01/2012											06/25/2012		
Central Falls	Cramer, Tiffany									C					
Central Falls	Garcia, Juan	07/01/2014												C	
Central Falls	Karnes, Jason	05/20/2014													
Central Falls	Kellendonk, Tina12345678901234567890									C	C	C	12/28/2014		
Central Falls	martin, Billyyy										C	C	10/07/2015		09/28/2015
Central Falls	McMilan, Andrea	05/28/2012								C					
Rumford	Billings, Cindy										C	C			

Meals- CACFP Eligibility Renewal - Excel

Last Modified on 01/07/2019 10:59 am EST

The CACFP Eligibility Renewal report will pull CACFP contracts that are expiring for the selected date range.

Report Conditions

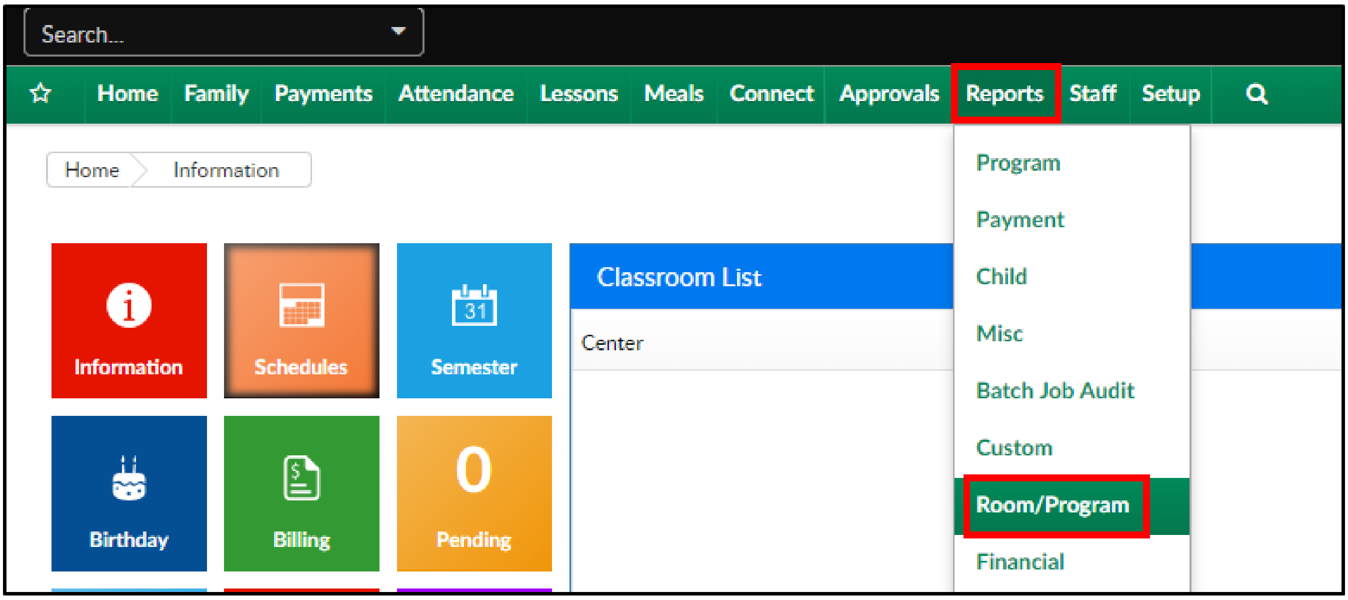
- The Center is not required; if the center is left blank, data will pull for all sites
- If only the From Date is entered, the field will act as an "As Of" date and pull all date from the entered date until current
- If only the To Date is completed, data will pull from the To Date to the current date

Sample Report

Click the report name to view a sample: CACFP Eligibility Renewal.xlsx 📎

Accessing the Report

1. From the Reports menu, click Room/Program

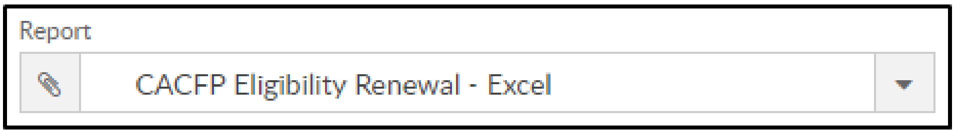


2. From the Report Category drop-down, select Meals

Report Category

Meals

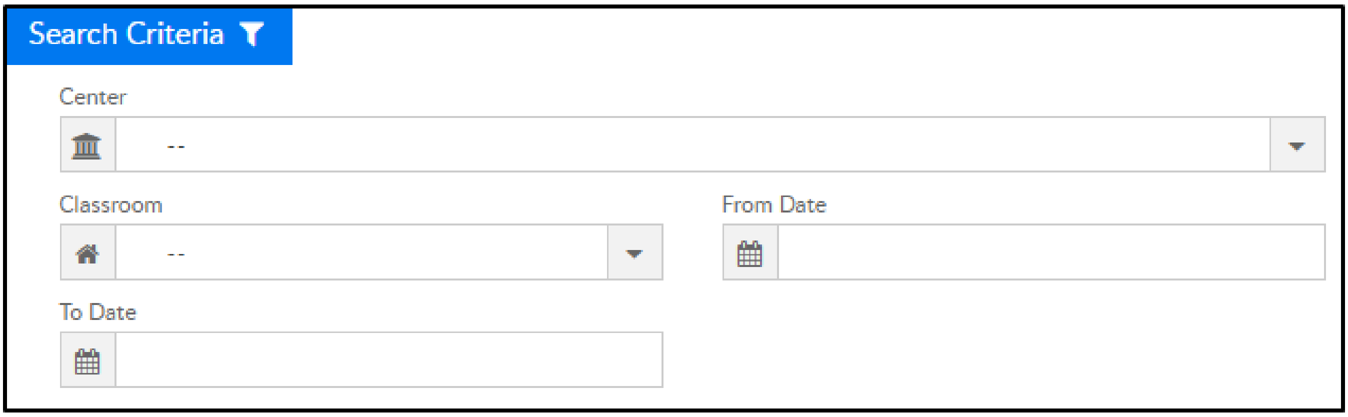
3. Choose CACFP Eligibility Renewal - Excel from the Report drop-down



Report

CACFP Eligibility Renewal - Excel

4. Use additional search criteria as needed



Search Criteria

Center: --

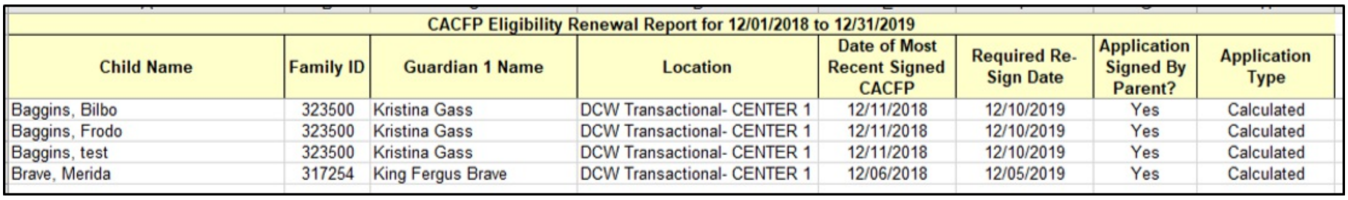
Classroom: --

From Date

To Date

   - From the Center drop-down, select the center or business level (not required)
   - Select a classroom, if applicable
   - Choose a From and To Date from the calendars

5. Click Create Report
6. The report will download in Excel format



CACFP Eligibility Renewal Report for 12/01/2018 to 12/31/2019

Child Name	Family ID	Guardian 1 Name	Location	Date of Most Recent Signed CACFP	Required Re-Sign Date	Application Signed By Parent?	Application Type
Baggins, Bilbo	323500	Kristina Gass	DCW Transactional- CENTER 1	12/11/2018	12/10/2019	Yes	Calculated
Baggins, Frodo	323500	Kristina Gass	DCW Transactional- CENTER 1	12/11/2018	12/10/2019	Yes	Calculated
Baggins, test	323500	Kristina Gass	DCW Transactional- CENTER 1	12/11/2018	12/10/2019	Yes	Calculated
Brave, Merida	317254	King Fergus Brave	DCW Transactional- CENTER 1	12/06/2018	12/05/2019	Yes	Calculated

Meals- CACFP Enrollment Summary - Excel

Last Modified on 01/04/2019 11:38 am EST

The CACFP Enrollment Summary is a detailed Excel document that displays the number of free, reduced, and paid students in a facility. If additional search criteria are used, data can be collected by certain categories, room/programs, states, months, or years.

Report Conditions

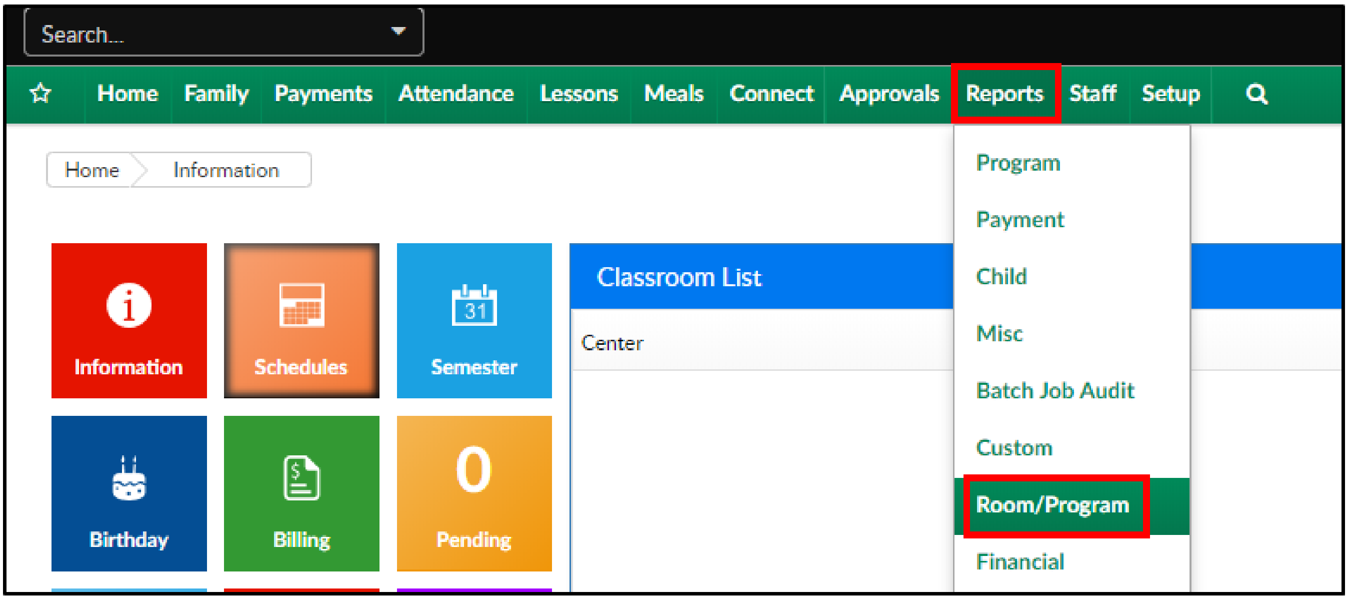
- If no search criteria are selected, the report will provide data for all centers in the current month
- Center is not required, if it is left blank, data will pull for all sites
- If a date is added to the From Date field, data will pull for the full month

Sample Report

Click the report name to view a sample: CACFP Enrollment Summary.xlsx 📎

Accessing the Report

1. From the Reports menu, click Room/Program

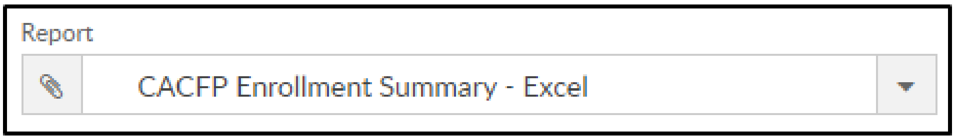


2. From the Report Category drop-down, select Meals

Report Category

Meals

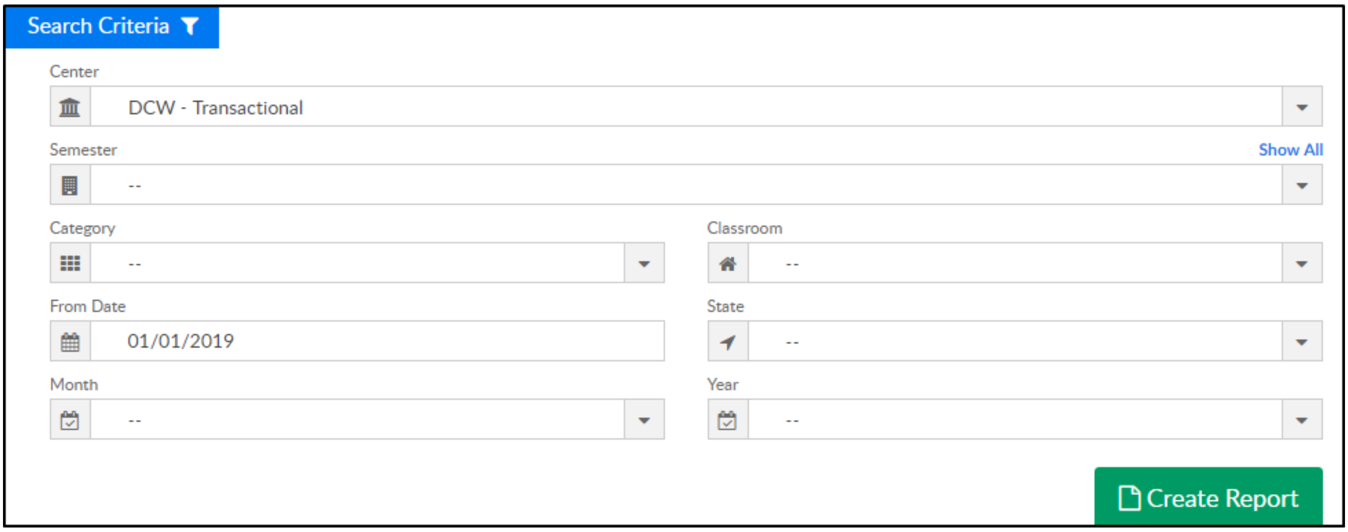
3. Choose CACFP Enrollment Summary - Excel from the Report drop-down



Report

CACFP Enrollment Summary - Excel

4. Use additional search criteria as needed, all fields are optional



Center: DCW - Transactional

Semester: --

Category: --

Classroom: --

From Date: 01/01/2019

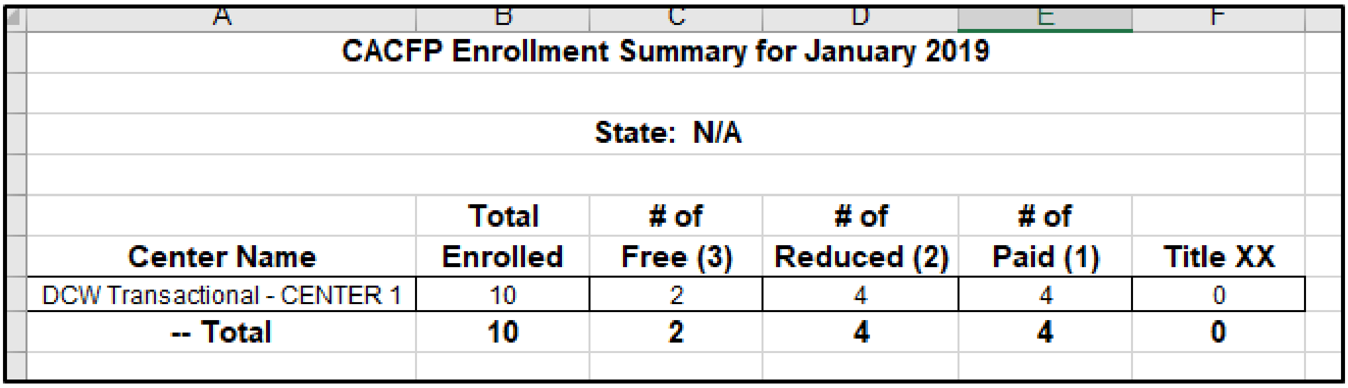
State: --

Month: --

Year: --

  - Center - choose the Center or the Business Level. **Please Note**: if left blank, it will pull all centers
  - Semester - choose a Semester from the drop-down. Select Show All to display inactive semesters
  - Category - select a Category from the drop-down
  - Classroom - choose a Classroom from the drop-down
  - From Date - select a From date from the calendar. If a date is not selected, data will pull for the current month
  - State - choose a State to pull data for a specific state
  - Month - select a month to only show data for one month
  - Year - select a year to pull data for the entire year

5. Click Create Report
6. The report will open in Excel



CACFP Enrollment Summary for January 2019

State: N/A

Center Name	Total Enrolled	# of Free (3)	# of Reduced (2)	# of Paid (1)	Title XX
DCW Transactional - CENTER 1	10	2	4	4	0
-- Total	**10**	**2**	**4**	**4**	**0**

Meals- CACFP Milk Usage Calculator - Excel

Last Modified on 01/07/2019 3:27 pm EST

This chart provides an estimate of the amount of milk that should be purchased based on the number of meals claimed in the CACFP Monthly Count Record. The chart automatically calculates the amount of milk, then breaks it down by ounces, gallons and quarts.

Report Conditions

- If center is left blank, data will show all centers
- If dates are not selected, data will pull for the current day

Sample Report

Click the report name to view a sample: Milk Usage Calculator.xlsx

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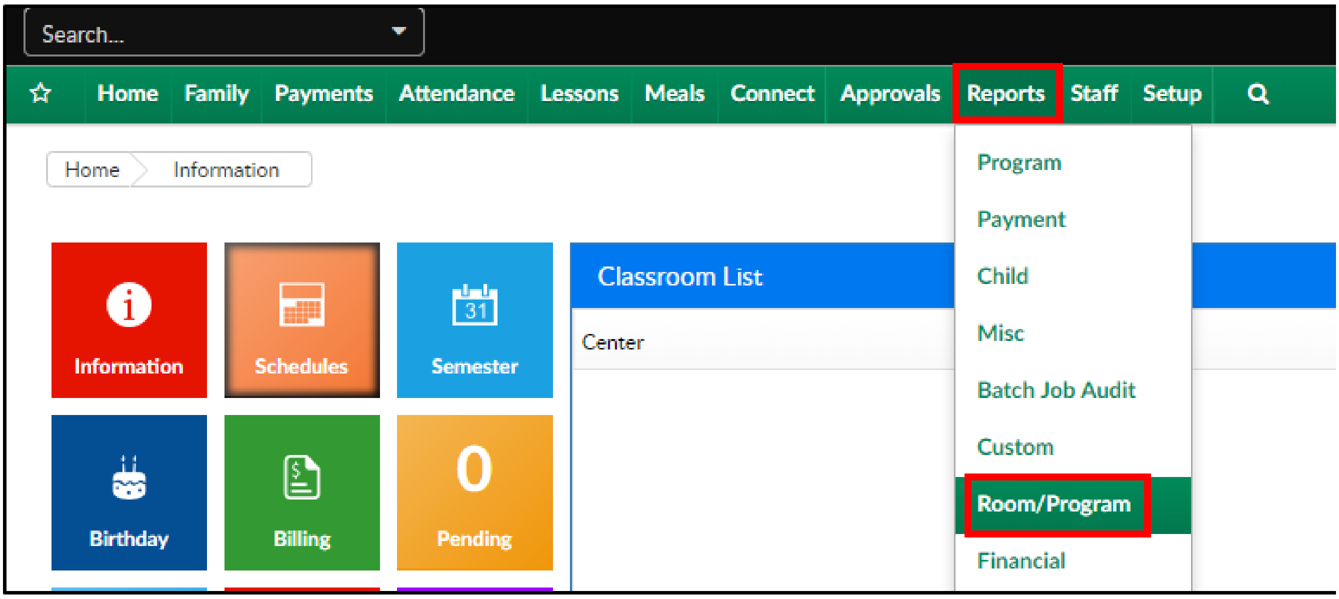
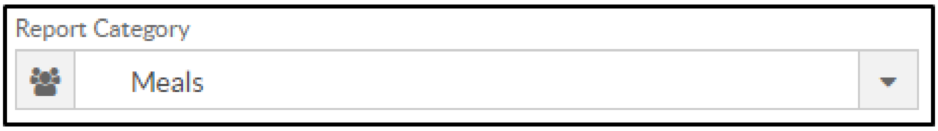
Accessing the Report

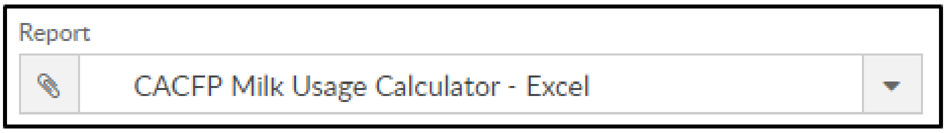
1. From the Reports menu, click Room/Program



2. From the Report Category drop-down, select Meals

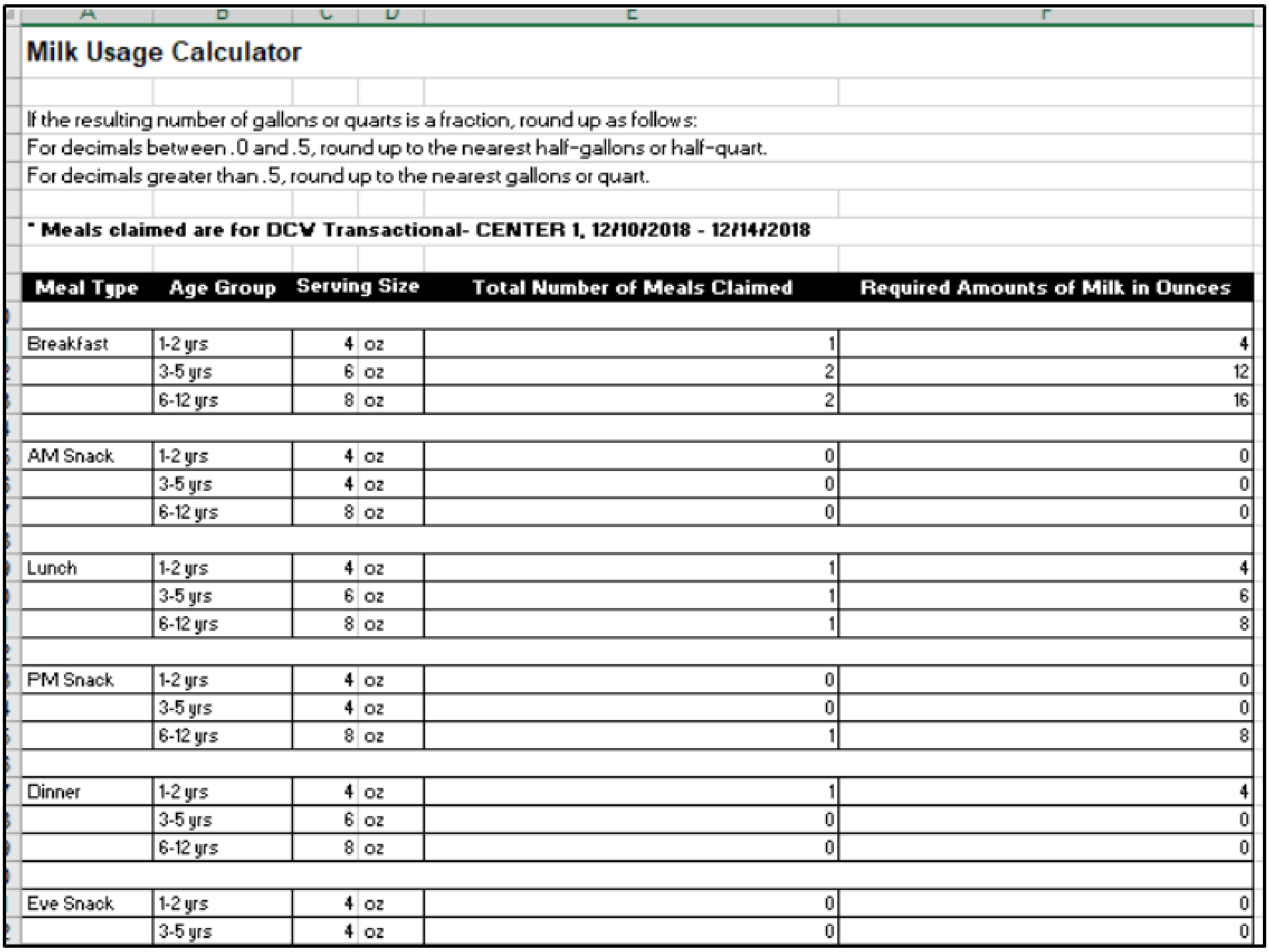

Report Category
Meals

3. Choose CACFP Milk Usage Calculator - Excel from the Report drop-down



CACFP Milk Usage Calculator - Excel

4. Use additional search criteria as needed, all fields are optional
    - Center - choose the Center or the Business Level. **Please Note**: if left blank, it will pull all centers
    - From Date - select a start date from the calendar
    - To Date - choose an end date from the calendar
5. Click Create Report
6. The report will open in Excel



Milk Usage Calculator

If the resulting number of gallons or quarts is a fraction, round up as follows:
For decimals between .0 and .5, round up to the nearest half-gallons or half-quart.
For decimals greater than .5, round up to the nearest gallons or quart.

*** Meals claimed are for DCV Transactional- CENTER 1, 12/10/2018 - 12/14/2018**

Meal Type	Age Group	Serving Size	Total Number of Meals Claimed	Required Amounts of Milk in Ounces
Breakfast	1-2 yrs	4 oz	1	4
	3-5 yrs	6 oz	2	12
	6-12 yrs	8 oz	2	16
AM Snack	1-2 yrs	4 oz	0	0
	3-5 yrs	4 oz	0	0
	6-12 yrs	8 oz	0	0
Lunch	1-2 yrs	4 oz	1	4
	3-5 yrs	6 oz	1	6
	6-12 yrs	8 oz	1	8
PM Snack	1-2 yrs	4 oz	0	0
	3-5 yrs	4 oz	0	0
	6-12 yrs	8 oz	1	8
Dinner	1-2 yrs	4 oz	1	4
	3-5 yrs	6 oz	0	0
	6-12 yrs	8 oz	0	0
Eve Snack	1-2 yrs	4 oz	0	0
	3-5 yrs	4 oz	0	0

Meals- CACFP Participants Roster - PDF/Excel

Last Modified on 01/07/2019 3:29 pm EST

The Participants Roster lists all students with a CACFP status as a PDF or Excel.

Report Conditions

- Center is not a required field; if left blank, the report will run for the entire business
- If dates are not selected, the report will run for the current date through the end of the month

Sample Report

Click the report name to view a sample: Participant Roster.pdf

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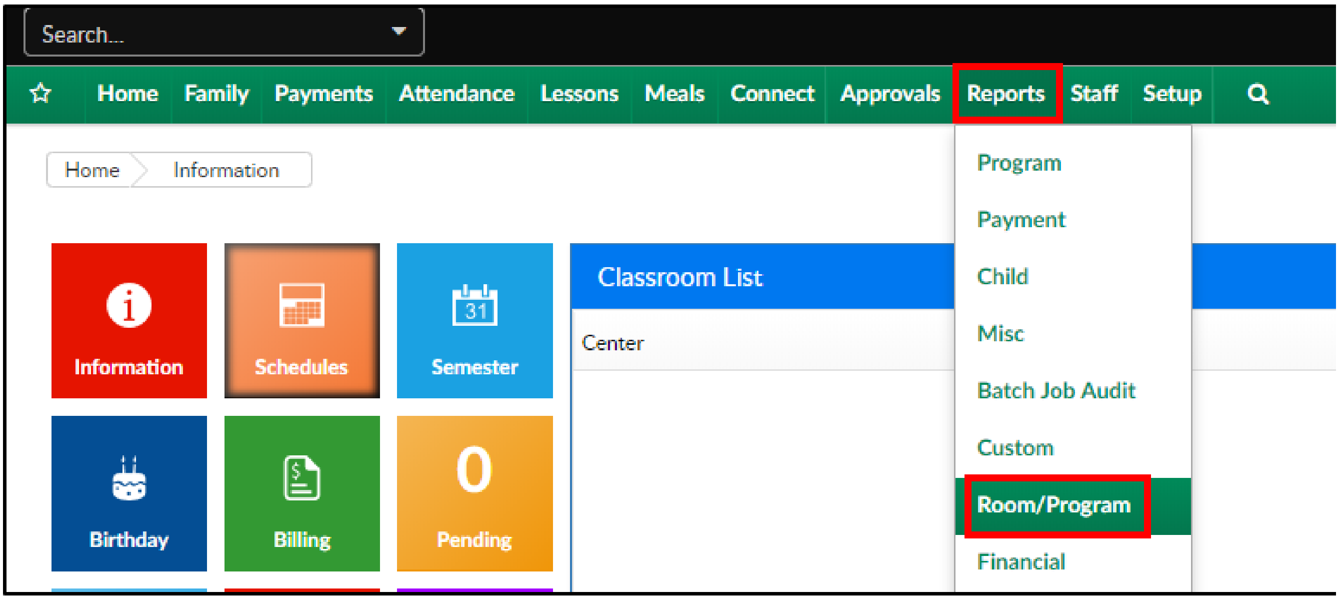
Accessing the Report

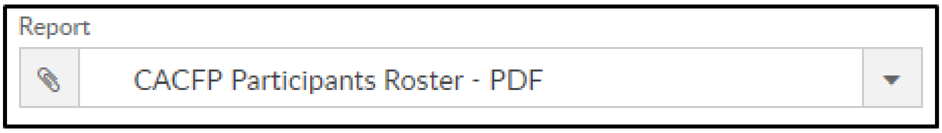
1. From the Reports menu, click Room/Program



2. From the Report Category drop-down, select Meals

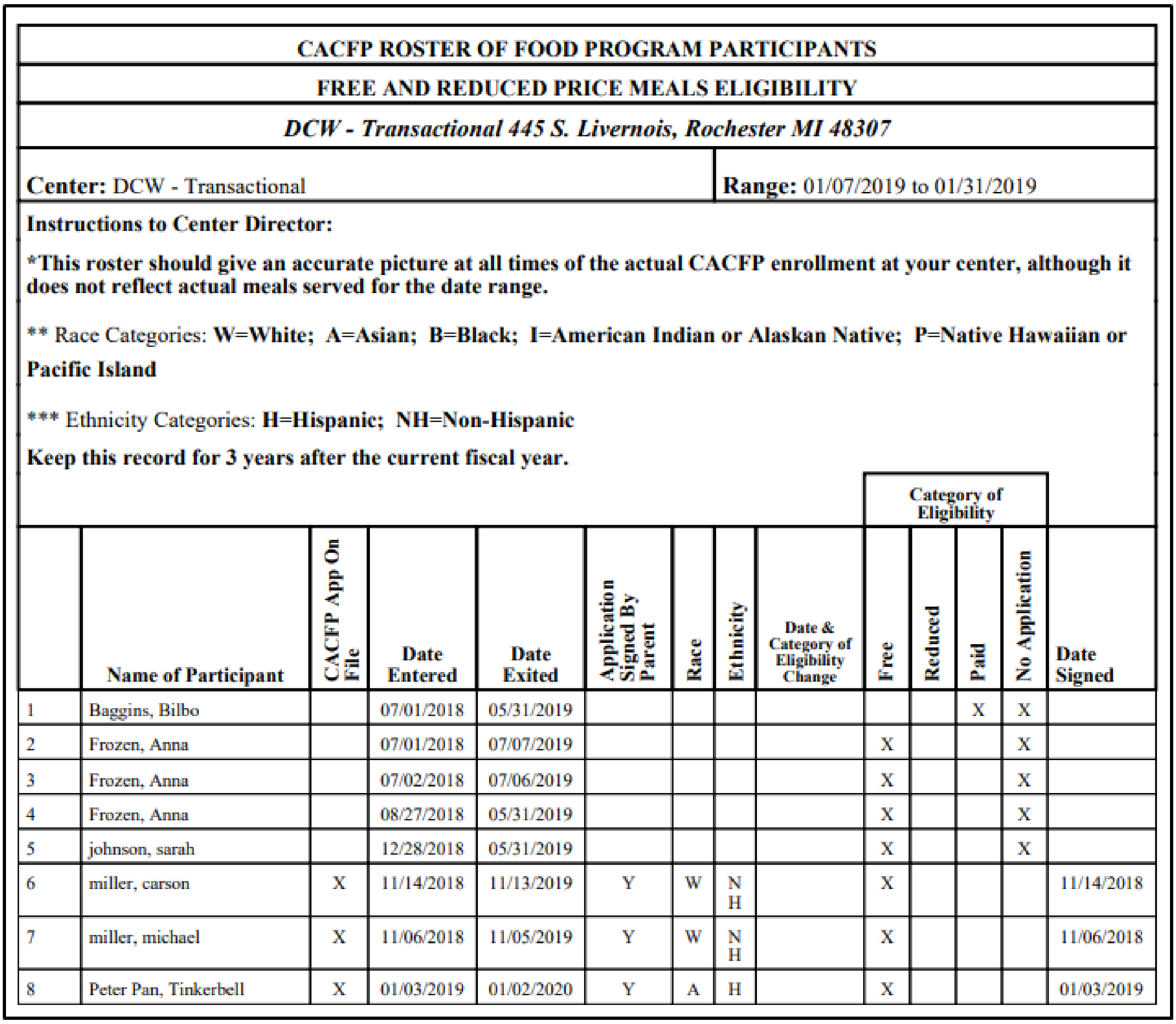
Report Category
Meals

3. Choose CACFP Participants Roster - PDF/Excel from the Report drop-down



Report
CACFP Participants Roster - PDF

4. Use additional search criteria as needed, all fields are optional
    - Center - choose the Center or the Business Level. **Please Note**: if left blank, it will pull all centers
    - From Date - select a start date from the calendar
    - To Date - choose an end date from the calendar
5. Click Create Report
6. The report will open in the selected format
    - PDF:



CACFP ROSTER OF FOOD PROGRAM PARTICIPANTS

FREE AND REDUCED PRICE MEALS ELIGIBILITY

DCW - Transactional 445 S. Livernois, Rochester MI 48307

Center: DCW - Transactional **Range:** 01/07/2019 to 01/31/2019

Instructions to Center Director:

***This roster should give an accurate picture at all times of the actual CACFP enrollment at your center, although it does not reflect actual meals served for the date range.**

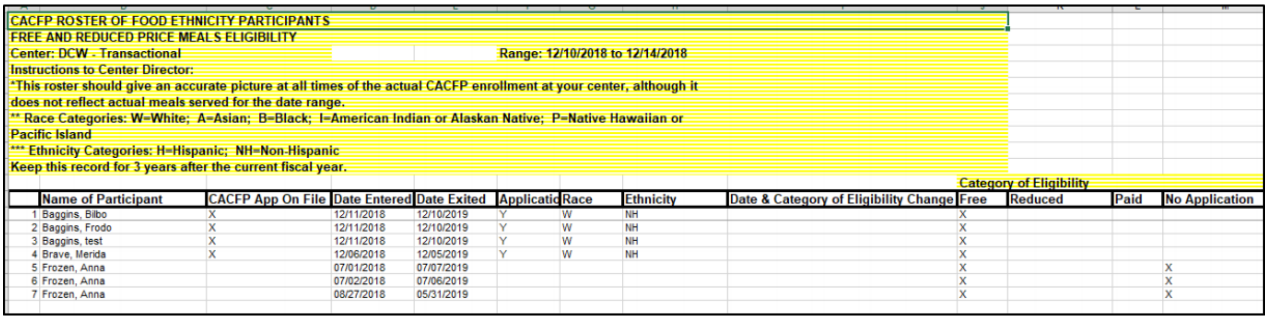
** Race Categories: **W=White; A=Asian; B=Black; I=American Indian or Alaskan Native; P=Native Hawaiian or Pacific Island**

*** Ethnicity Categories: **H=Hispanic; NH=Non-Hispanic**

Keep this record for 3 years after the current fiscal year.

									Category of Eligibility				
	Name of Participant	**CACFP App On File**	**Date Entered**	**Date Exited**	**Application Signed By Parent**	**Race**	**Ethnicity**	**Date & Category of Eligibility Change**	**Free**	**Reduced**	**Paid**	**No Application**	**Date Signed**
1	Baggins, Bilbo		07/01/2018	05/31/2019							X	X	
2	Frozen, Anna		07/01/2018	07/07/2019					X			X	
3	Frozen, Anna		07/02/2018	07/06/2019					X			X	
4	Frozen, Anna		08/27/2018	05/31/2019					X			X	
5	johnson, sarah		12/28/2018	05/31/2019					X			X	
6	miller, carson	X	11/14/2018	11/13/2019	Y	W	NH		X				11/14/2018
7	miller, michael	X	11/06/2018	11/05/2019	Y	W	NH		X				11/06/2018
8	Peter Pan, Tinkerbell	X	01/03/2019	01/02/2020	Y	A	H		X				01/03/2019

    - Excel:



CACFP ROSTER OF FOOD ETHNICITY PARTICIPANTS
FREE AND REDUCED PRICE MEALS ELIGIBILITY
Center: DCW - Transactional Range: 12/10/2018 to 12/14/2018
Instructions to Center Director:
*This roster should give an accurate picture at all times of the actual CACFP enrollment at your center, although it does not reflect actual meals served for the date range.
** Race Categories: W=White; A=Asian; B=Black; I=American Indian or Alaskan Native; P=Native Hawaiian or Pacific Island
*** Ethnicity Categories: H=Hispanic; NH=Non-Hispanic
Keep this record for 3 years after the current fiscal year.

									Category of Eligibility			
	Name of Participant	CACFP App On File	Date Entered	Date Exited	Applicatio	Race	Ethnicity	Date & Category of Eligibility Change	Free	Reduced	Paid	No Application
1	Baggins, Bilbo	X	12/11/2018	12/10/2019	Y	W	NH		X			
2	Baggins, Frodo	X	12/11/2018	12/10/2019	Y	W	NH		X			
3	Baggins, test	X	12/11/2018	12/10/2019	Y	W	NH		X			
4	Brave, Merida	X	12/06/2018	12/05/2019	Y	W	NH		X			
5	Frozen, Anna		07/01/2018	07/07/2019					X			X
6	Frozen, Anna		07/02/2018	07/06/2019					X			X
7	Frozen, Anna		08/27/2018	05/31/2019					X			X

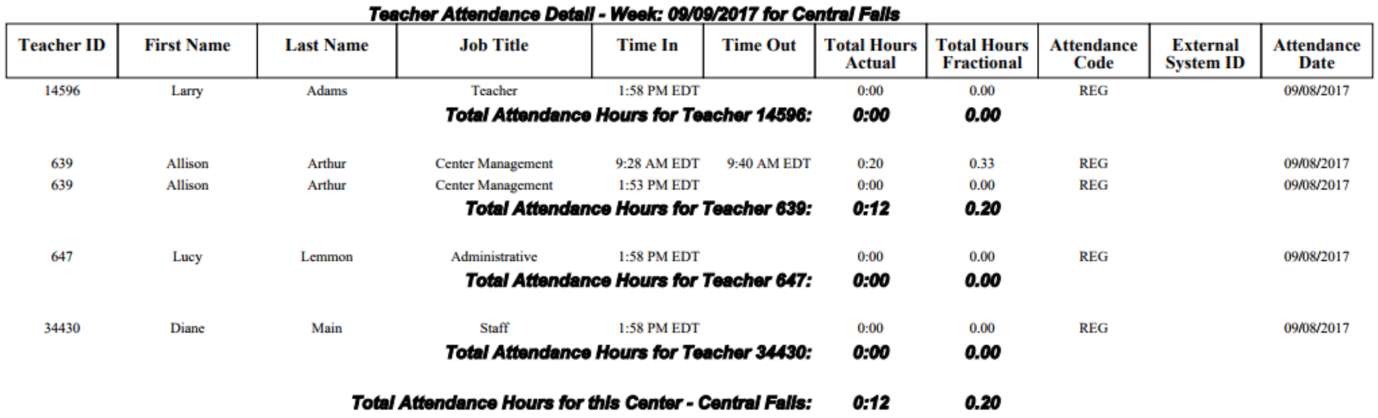
Staff- Teacher Attendance Detail - Excel

Last Modified on 10/24/2017 6:32 pm EDT

This report displays a detailed record of staff attendance, including check in/check out date and time, Teacher ID, total hours actual and total hours fractional.

This report is useful for keeping accurate staff attendance records and calculating staff hours for payroll.

Required fields: From Date; Center/Business Level



Teacher Attendance Detail - Week: 09/09/2017 for Central Falls

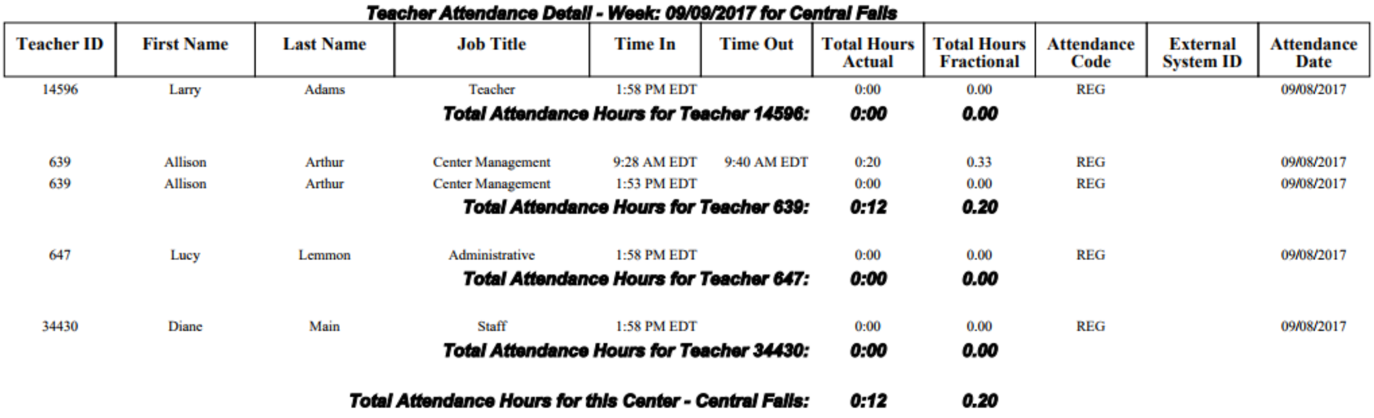
Teacher ID	First Name	Last Name	Job Title	Time In	Time Out	Total Hours Actual	Total Hours Fractional	Attendance Code	External System ID	Attendance Date
14596	Larry	Adams	Teacher	1:58 PM EDT		0:00	0.00	REG		09/08/2017
					Total Attendance Hours for Teacher 14596:	***0:00***	***0.00***			
639	Allison	Arthur	Center Management	9:28 AM EDT	9:40 AM EDT	0:20	0.33	REG		09/08/2017
639	Allison	Arthur	Center Management	1:53 PM EDT		0:00	0.00	REG		09/08/2017
					Total Attendance Hours for Teacher 639:	***0:12***	***0.20***			
647	Lucy	Lemmon	Administrative	1:58 PM EDT		0:00	0.00	REG		09/08/2017
					Total Attendance Hours for Teacher 647:	***0:00***	***0.00***			
34430	Diane	Main	Staff	1:58 PM EDT		0:00	0.00	REG		09/08/2017
					Total Attendance Hours for Teacher 34430:	***0:00***	***0.00***			
					Total Attendance Hours for this Center - Central Falls:	***0:12***	***0.20***			

Staff- Teacher Attendance Detail - PDF

Last Modified on 10/24/2017 6:46 pm EDT

This PDF report is useful for calculating staff hours for payroll. The report includes Teacher ID, First and Last Name, Date and Time of Check-in/Check-out, Total Actual Hours, and Total Hours Fractional.

Required Fields: Center or Business Level; From Date.

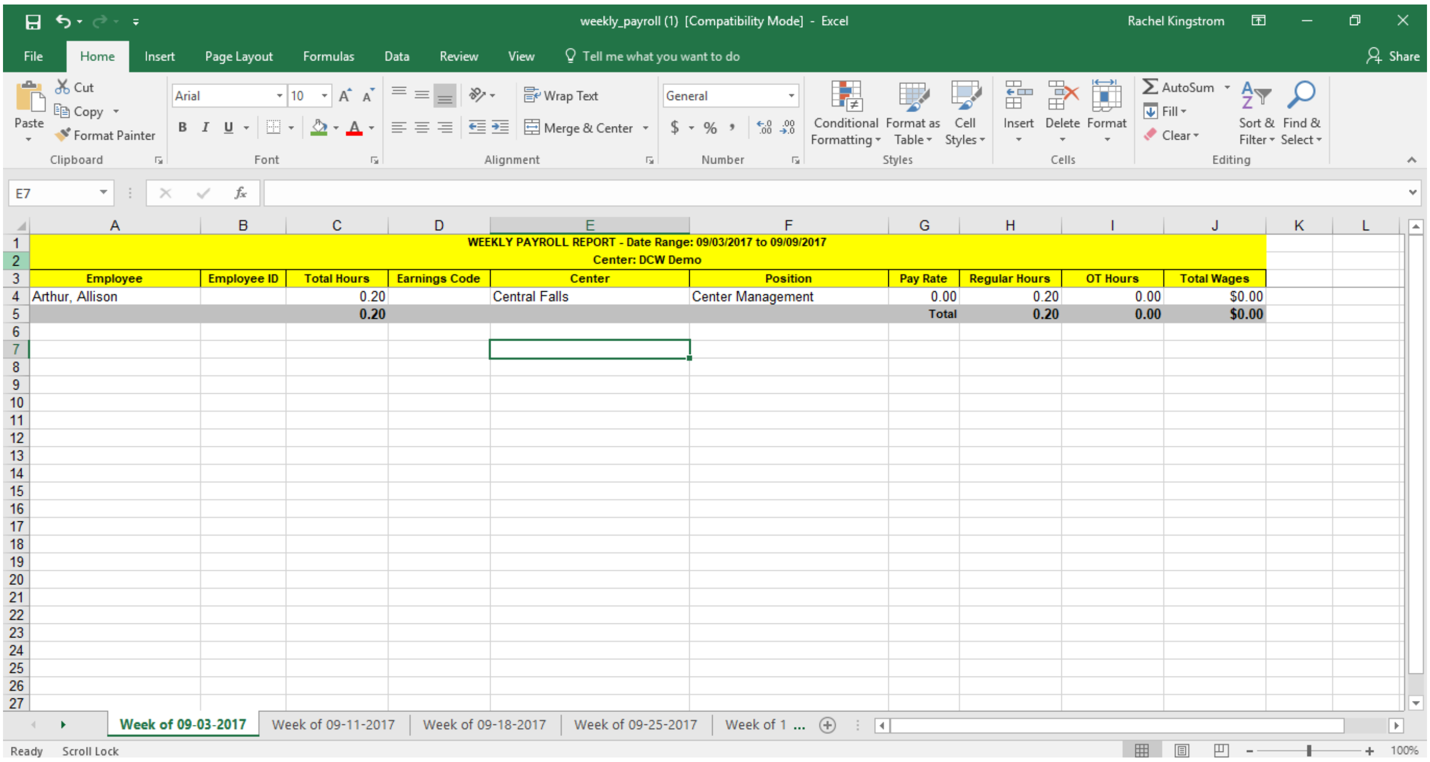


Teacher Attendance Detail - Week: 09/09/2017 for Central Falls

Teacher ID	First Name	Last Name	Job Title	Time In	Time Out	Total Hours Actual	Total Hours Fractional	Attendance Code	External System ID	Attendance Date
14596	Larry	Adams	Teacher	1:58 PM EDT		0:00	0.00	REG		09/08/2017
				Total Attendance Hours for Teacher 14596:		**0:00**	**0.00**			
639	Allison	Arthur	Center Management	9:28 AM EDT	9:40 AM EDT	0:20	0.33	REG		09/08/2017
639	Allison	Arthur	Center Management	1:53 PM EDT		0:00	0.00	REG		09/08/2017
				Total Attendance Hours for Teacher 639:		**0:12**	**0.20**			
647	Lucy	Lemmon	Administrative	1:58 PM EDT		0:00	0.00	REG		09/08/2017
				Total Attendance Hours for Teacher 647:		**0:00**	**0.00**			
34430	Diane	Main	Staff	1:58 PM EDT		0:00	0.00	REG		09/08/2017
				Total Attendance Hours for Teacher 34430:		**0:00**	**0.00**			
				Total Attendance Hours for this Center - Central Falls:		**0:12**	**0.20**			

Staff- Weekly Payroll - Excel

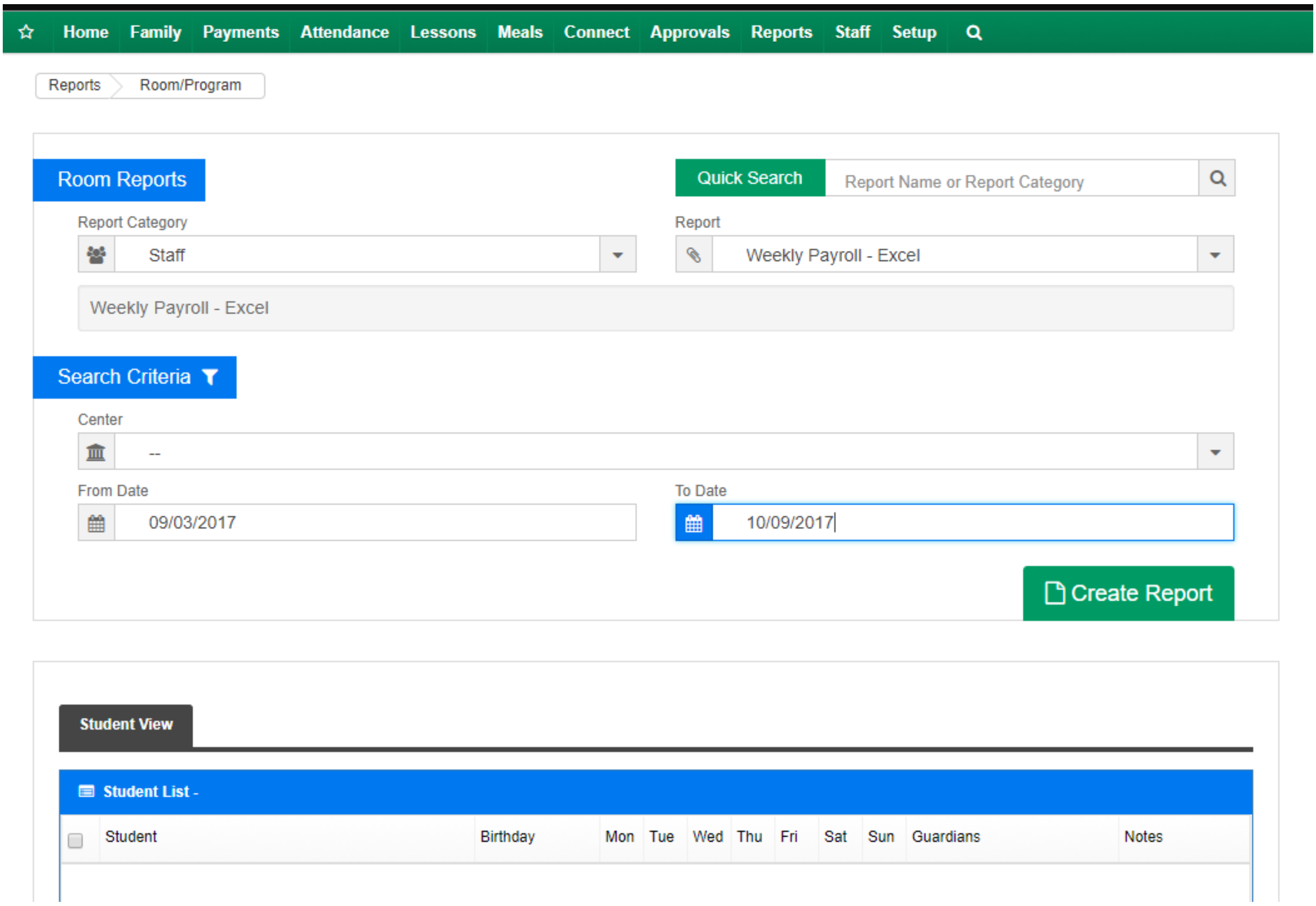
Last Modified on 10/20/2017 4:50 pm EDT



WEEKLY PAYROLL REPORT - Date Range: 09/03/2017 to 09/09/2017

Center: DCW Demo

Employee	Employee ID	Total Hours	Earnings Code	Center	Position	Pay Rate	Regular Hours	OT Hours	Total Wages
Arthur, Allison		0.20		Central Falls	Center Management	0.00	0.20	0.00	$0.00
		0.20				Total	0.20	0.00	$0.00



Report Category: Staff

Report: Weekly Payroll - Excel

Weekly Payroll - Excel

Center: --

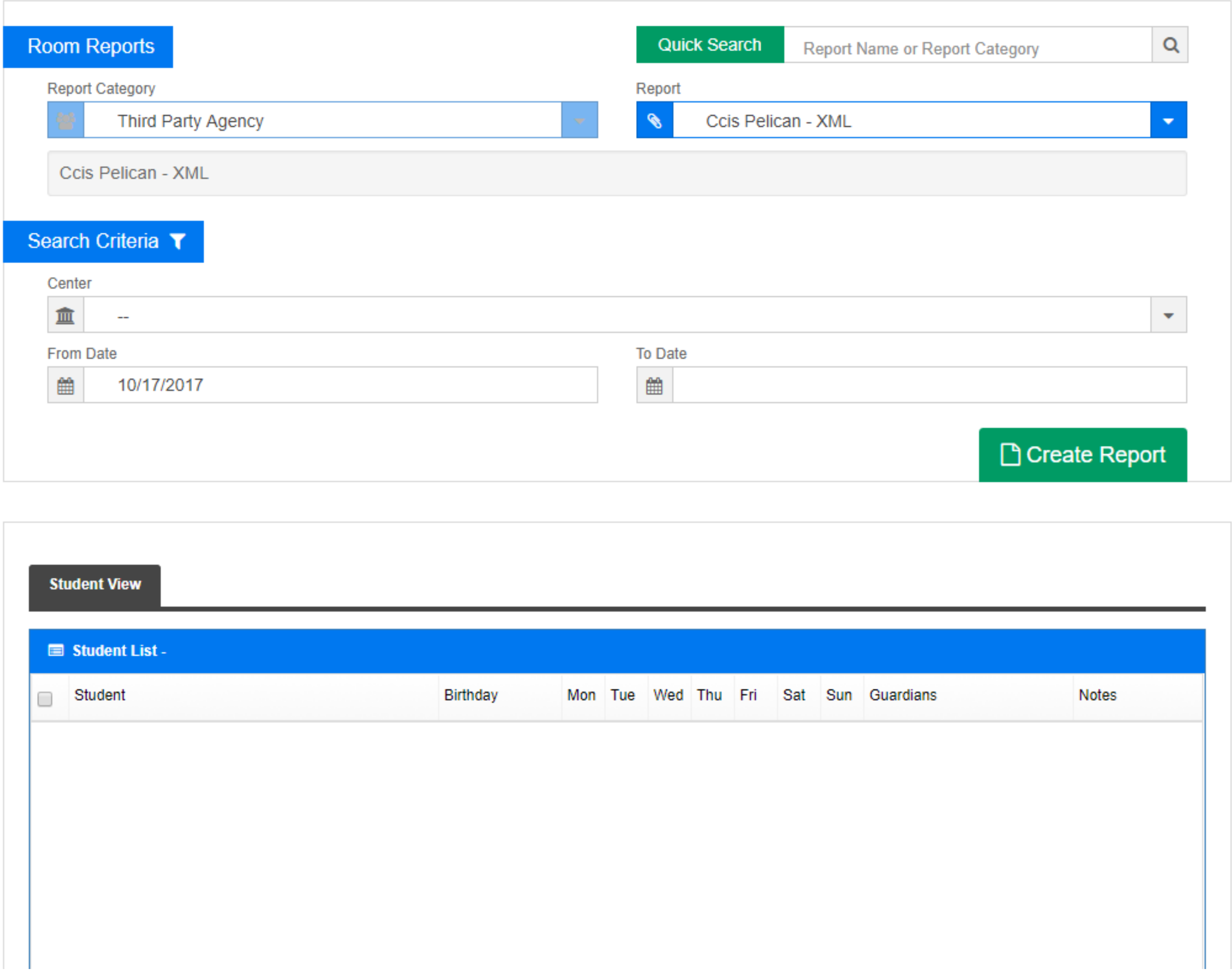
From Date: 09/03/2017

To Date: 10/09/2017

☐	Student	Birthday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Guardians	Notes

Third Party Agency- CCIS Pelican - XML

Last Modified on 10/20/2017 4:49 pm EDT



Report Category: Third Party Agency

Report: Ccis Pelican - XML

Ccis Pelican - XML

Center: --

From Date: 10/17/2017

To Date:

Student List -

☐	Student	Birthday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Guardians	Notes

Export/Upload- Quick Books General Journal Export

Last Modified on 05/29/2018 10:47 am EDT

This report will allow for export of data into journal format that can be converted to a QuickBooks type file and uploaded.

Quick Books General Journal Export Requirements

1. This export retrieves the revenue and payment data by Program Center, not Family Center. It should also work if the client is set up so that families cannot enroll their children at other centers.
2. It also gathers the data using the Post/Payment date and not Create Date. If transactions are back dated (created after the Post Date), there is the possibility that they can be skipped, depending on the date range.
3. The export will look for the Account string setup in the GL Builder. It uses that string in Column E (ACCNT). The Account string can have one or more segments. It is using the Formatted GL Code, i.e., the Account string will have dashes if there is more than one segment.
4. The export will use the Valid Value description for the Type – Fee or Type – Payment in Column I (MEMO). If multiple Fees or Payments have the same GL Code, it will use the first one it comes across when the data is retrieved. This is true for Discounts, Agencies, etc.
5. If the client wants different fee types with the same GL Code to be grouped in separate batches in the export, they should have separate GL Codes and separate GL setups in the GL Builder.
6. All Type-Fees and Type-Payments should have a GL Code and Offset GL Code, and they should be set up in the GL Builder.
7. Unlike other GL exports that do not do offsets for discounts, this export will. Because Discounts do not have an offset GL, this export will use the default Offset GL. The default Offset GL will be the Offset GL Code that is set up for the most Valid Value entries.
8. If the client wishes to split private pay fees from agency fees, it can be done by

associating the GL Code with the Room Category GL and have the Room Category GL for each type separated by a comma.

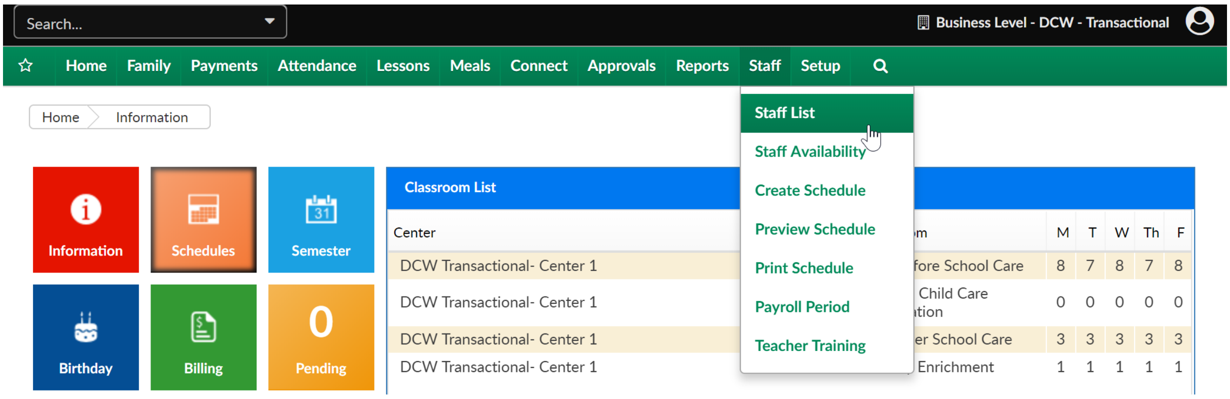
9. If the agency details are split in this manner, it will use the name of the first agency it comes across when the data is retrieved in Column I (MEMO). If there are multiple agencies, the export will not be able to separate them. All will be grouped under one agency name.
10. The export summarizes the data by GL Code, Date, and Center (Internal Center ID). It puts the Internal Center ID in Column F (CLASS).

Staff > Staff List

Last Modified on 12/14/2017 11:28 am EST

The Staff List screen will display active and inactive staff that have been added to a site/business. If a user is viewing from the business level all staff will display, if viewing from a center level only staff associated with that center will display.

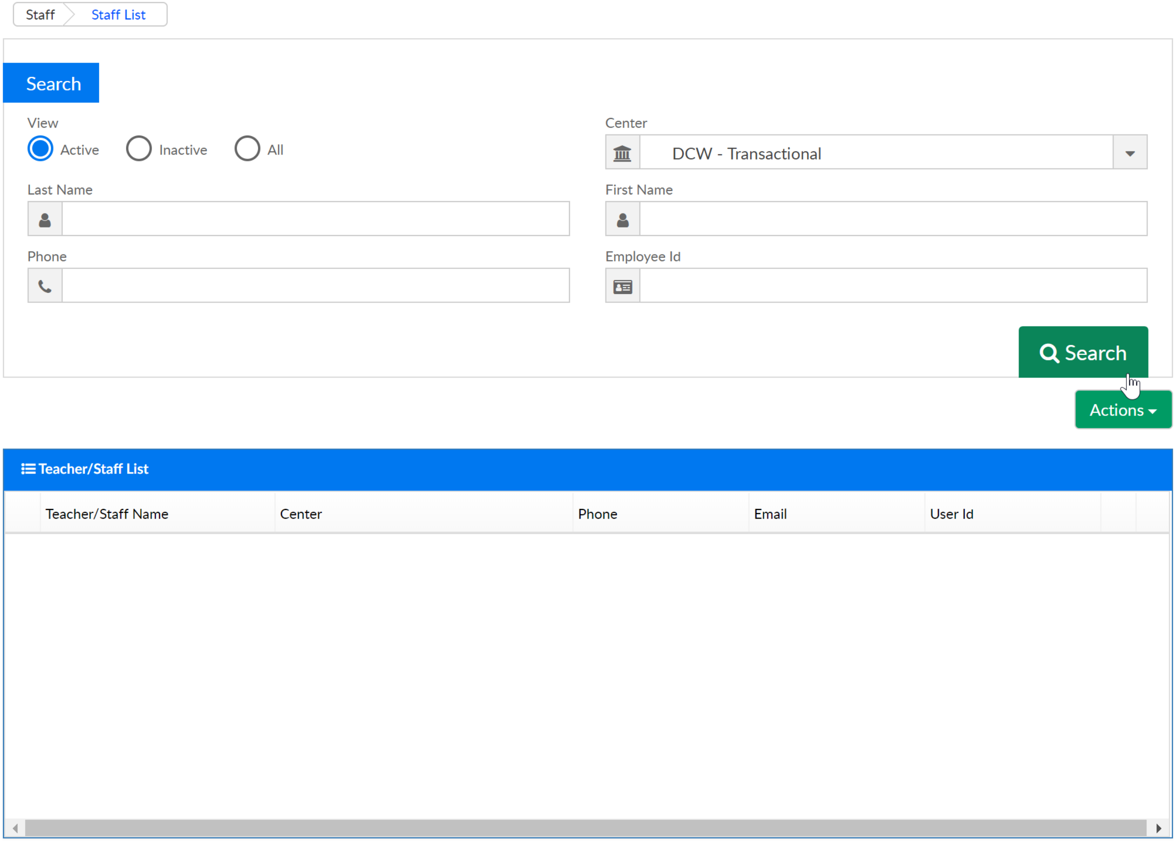
From the Staff menu select the Staff List option.



Center	m	M	T	W	Th	F
DCW Transactional- Center 1	fore School Care	8	7	8	7	8
DCW Transactional- Center 1	Child Care ation	0	0	0	0	0
DCW Transactional- Center 1	er School Care	3	3	3	3	3
DCW Transactional- Center 1	Enrichment	1	1	1	1	1

On the Staff List screen enter search criteria

- View
  - Active
  - Inactive
  - All
- Center- if business level is selected all staff will display, if a center level is selected only staff associated to that center will display
- Last Name- if searching for a specific teacher/staff member enter their last name
- First Name- if searching for a specific teacher/staff member enter their first name
- Phone- if searching for a specific teacher/staff member enter their phone number
- Employee ID- if searching for a specific teacher/staff member enter their employee ID

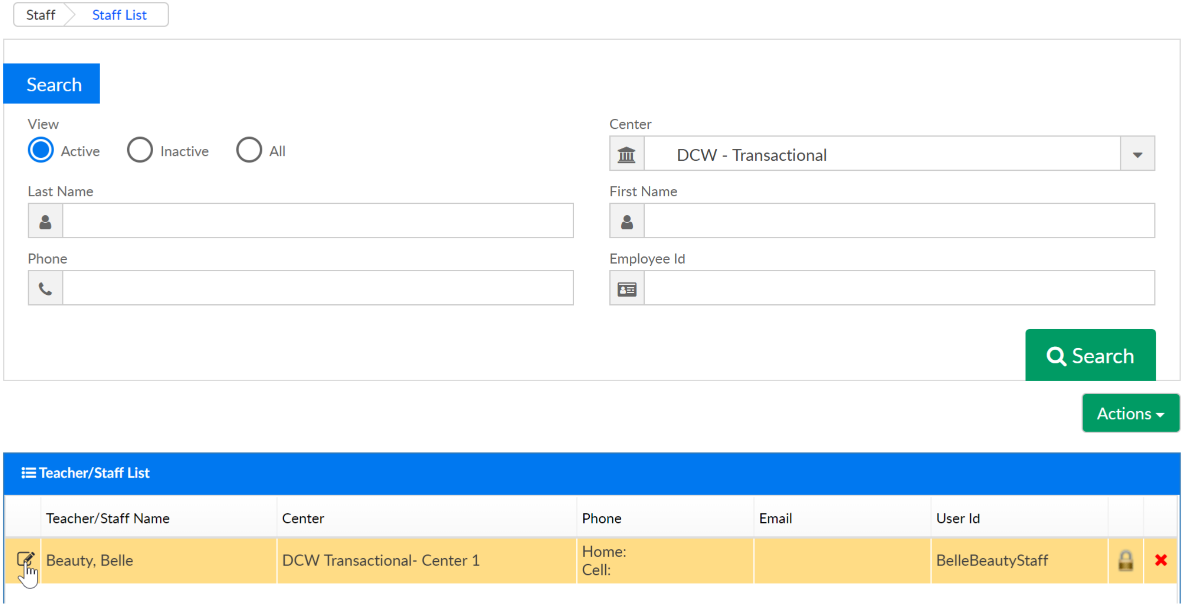


View: ● Active ○ Inactive ○ All

Center: DCW - Transactional

Teacher/Staff Name	Center	Phone	Email	User Id

Once staff members display click the edit icon to the left of the teacher's name to view/edit a staff's detail. To view/edit a staff's programs authorization click the lock icon. To delete a staff's record select the red x to the very right side.



View: ● Active ○ Inactive ○ All

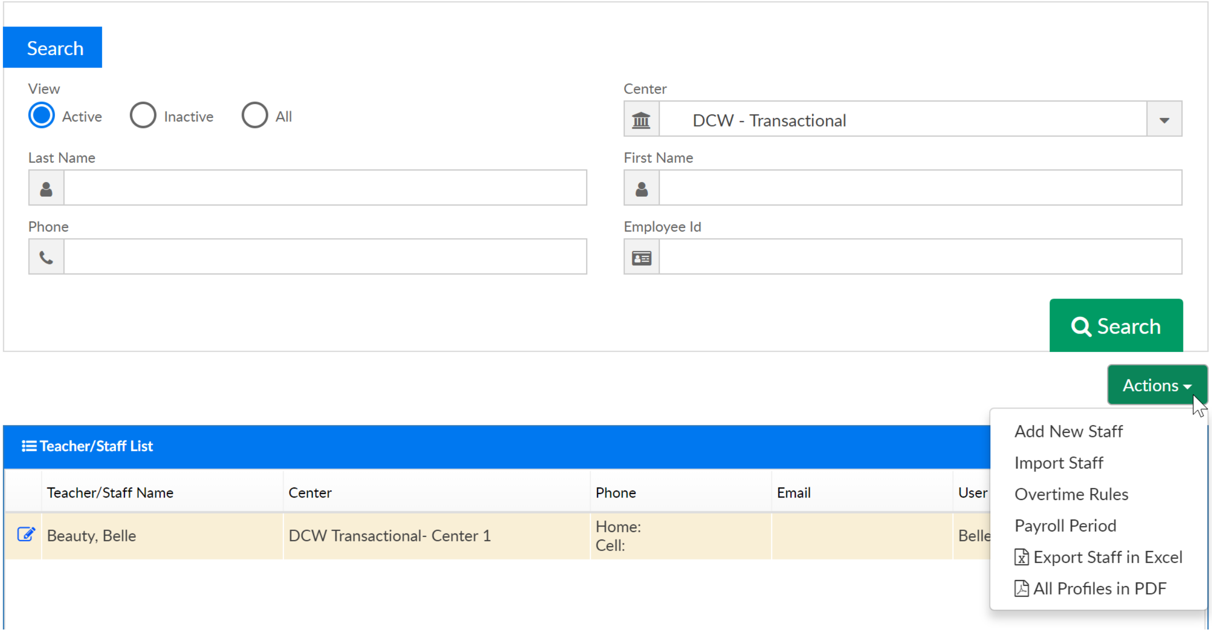
Center: DCW - Transactional

Teacher/Staff Name	Center	Phone	Email	User Id
Beauty, Belle	DCW Transactional- Center 1	Home: Cell:		BelleBeautyStaff

Under the Actions menu the below options display-

- Add New Staff- select this option to create a new staff record
- Import Staff- select this option to upload new staff into the system

- Overtime Rules- select this option to enter overtime rules for staff attendance
- Payroll Period- select this option to add payroll period into the system (only needed if you have purchased a payroll integration)
- Export Staff in Excel- select this option to view a list of all staff organized by site in excel.
- All Profiles in PDF



View: ● Active ○ Inactive ○ All

Center: DCW - Transactional

Last Name

First Name

Phone

Employee Id

Teacher/Staff List

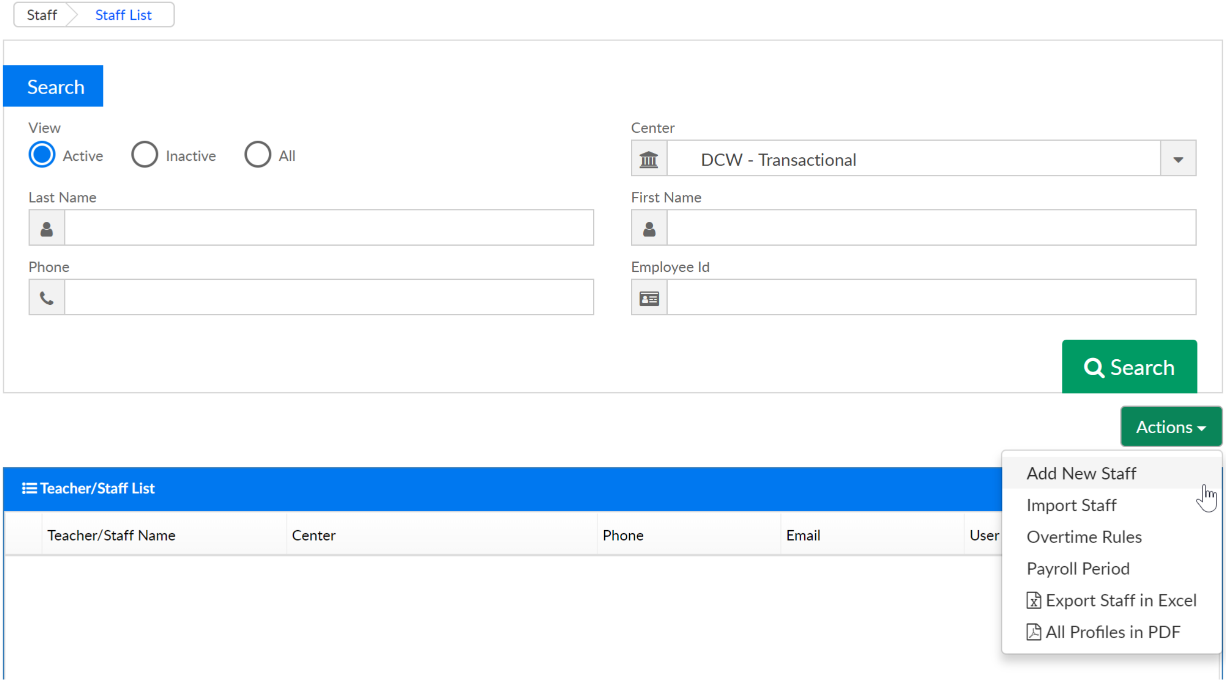
	Teacher/Staff Name	Center	Phone	Email	User
	Beauty, Belle	DCW Transactional- Center 1	Home: Cell:		Belle

Staff > Staff List, Adding/Editing Staff Records

Last Modified on 12/15/2017 4:14 pm EST

From the staff list page , staff can be added or edited into the system.

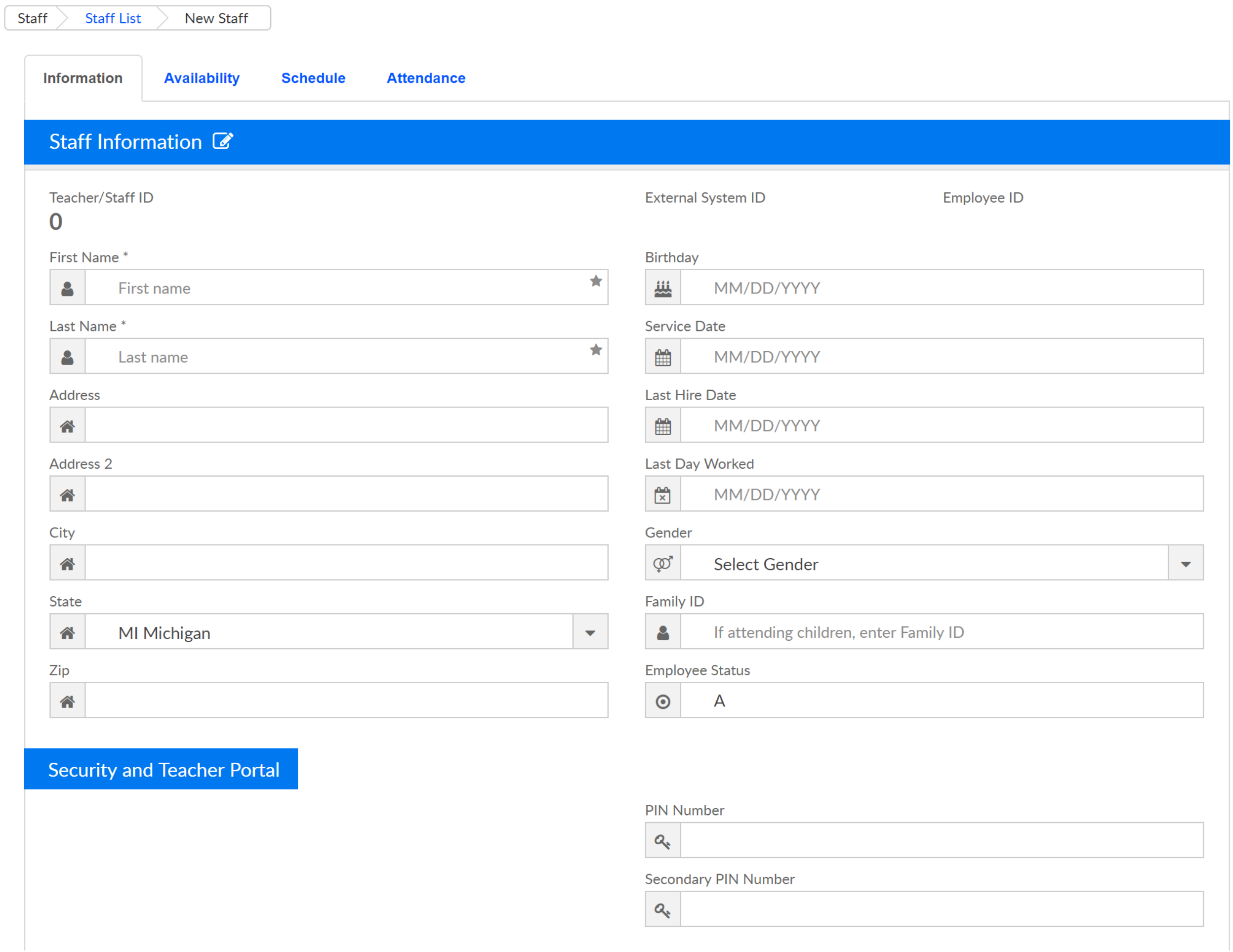
To **add** a staff member select the actions icon, then select Add New Staff.



On the Add New Staff Page enter as much or as little information as desired into the staff record, then press Save.

The required information is noted below-

- First Name
- Last Name
- Default Center



Staff Information

Teacher/Staff ID
0

External System ID

Employee ID

First Name *
First name

Last Name *
Last name

Address

Address 2

City

State
MI Michigan

Zip

Birthday
MM/DD/YYYY

Service Date
MM/DD/YYYY

Last Hire Date
MM/DD/YYYY

Last Day Worked
MM/DD/YYYY

Gender
Select Gender

Family ID
If attending children, enter Family ID

Employee Status
A

Security and Teacher Portal

PIN Number

Secondary PIN Number

Go back to the Staff > Staff List page and search for the new employee/staff member that has been entered.

If the staff member will be using the staff portal, admin side or InSite Provider application the user will need a User ID and password, to add this detail select the edit icon next to the user's name.

To edit a staff member's profile select the edit icon next to a user's name on the Staff > Staff List page. Edit the field that needs to be adjusted, or add a certificate or job category to the staff's profile, then press Save.

The below fields are available on the staff profile page-

Staff Information

- First Name
- Birthday
- Last Name
- Service Date
- Address

- Last Hire Date
- Address 2
- Last Day Worked
- City
- Gender
- State
- Family ID
- Zip
- Employee Zip

Security and Teacher Portal (Username and Password fields will only display after the initial save of an staff profile)

- Username
- Password
- PIN Number
- Secondary PIN Number

Contact Information

- Home Phone
- Cell Phone
- Email
- Twitter Username
- Home Room Teacher
- Home Room

Health and Certifications

- Last Tuberculosis
- FIA
- TB X-Ray
- TB Positive Result
- Last Physical

- CPR/First Aid Expires
- Fire Safety
- Certification Expires
- Notes

Employment Information

- Default Center
- Pay Type
- Status Type
- Primary Job Category
- Total Work Week (Hours)
- Full/Part Time
- Wage Type
- Wage Amount
- Sick Time Balance
- Vacation Balance
- Emergency Preparedness
- MD Signed
- Reference Letters
- High School Diploma
- Medical Issues
- FBI Clearance Result
- Evaluation Date
- Highest Degree Attained
- Degree/Diploma Date
- Experience
- Majors

Certification List

- Certifications/Training detail can be tracked here

Job Category List

- Job category detail can be listed here, it will display when a user

Staff > Staff Availability

Last Modified on 06/06/2018 2:39 pm EDT

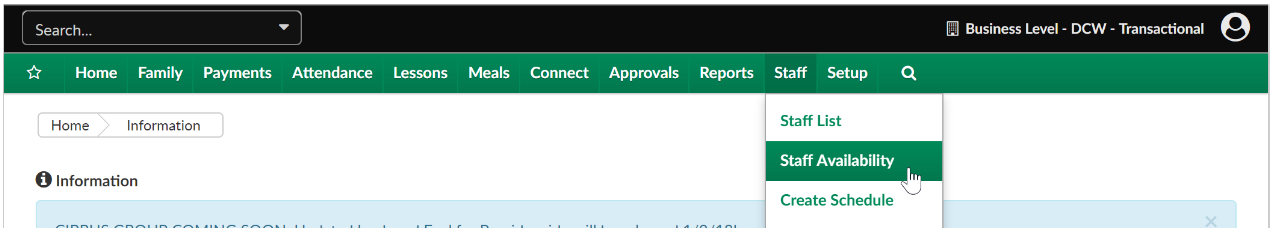
The Staff > Availability screen will allow admin level users to add availability for their staff. This is part of the overall scheduling process for staff. Availability can be added generically on an ongoing basis or for a specific week. There are settings for how many weeks can be adjusted on the setup > system config, Extended Config screen.

Pre-Work

In order to utilize this process, verify the below items have been setup within the system-

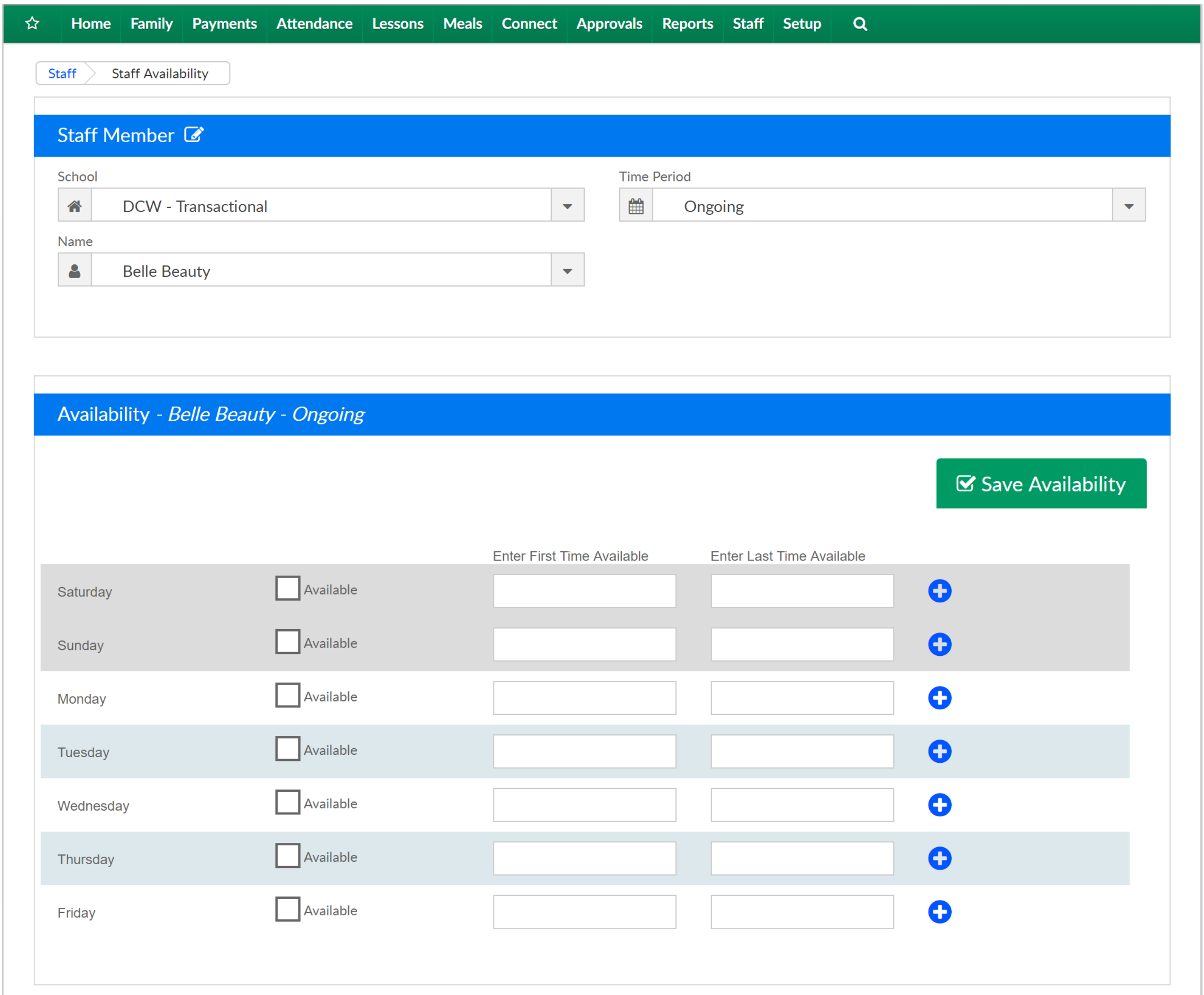
- Home > Hours- center hours must be current, for each day select the from and to time the center will operate.
- Staff must be setup under Staff > Staff list , be sure each staff member is associated to a specific site.
- For each role that will access labor planning options Activity IDs: 394, 395, 1059 must be set to All Permissions.
- Go to Staff > Staff Availability to setup times staff can be scheduled.

From the Staff Menu item select Staff Availability



On the Staff Availability screen select a school, time period and staff member availability will be added for.   Availability can be entered as ongoing. Modifications can be made for individual weeks in advance. If changes have been made to a future week the week will show in orange.

Once all criteria have been selected availability times can be added for each day.



School: DCW - Transactional

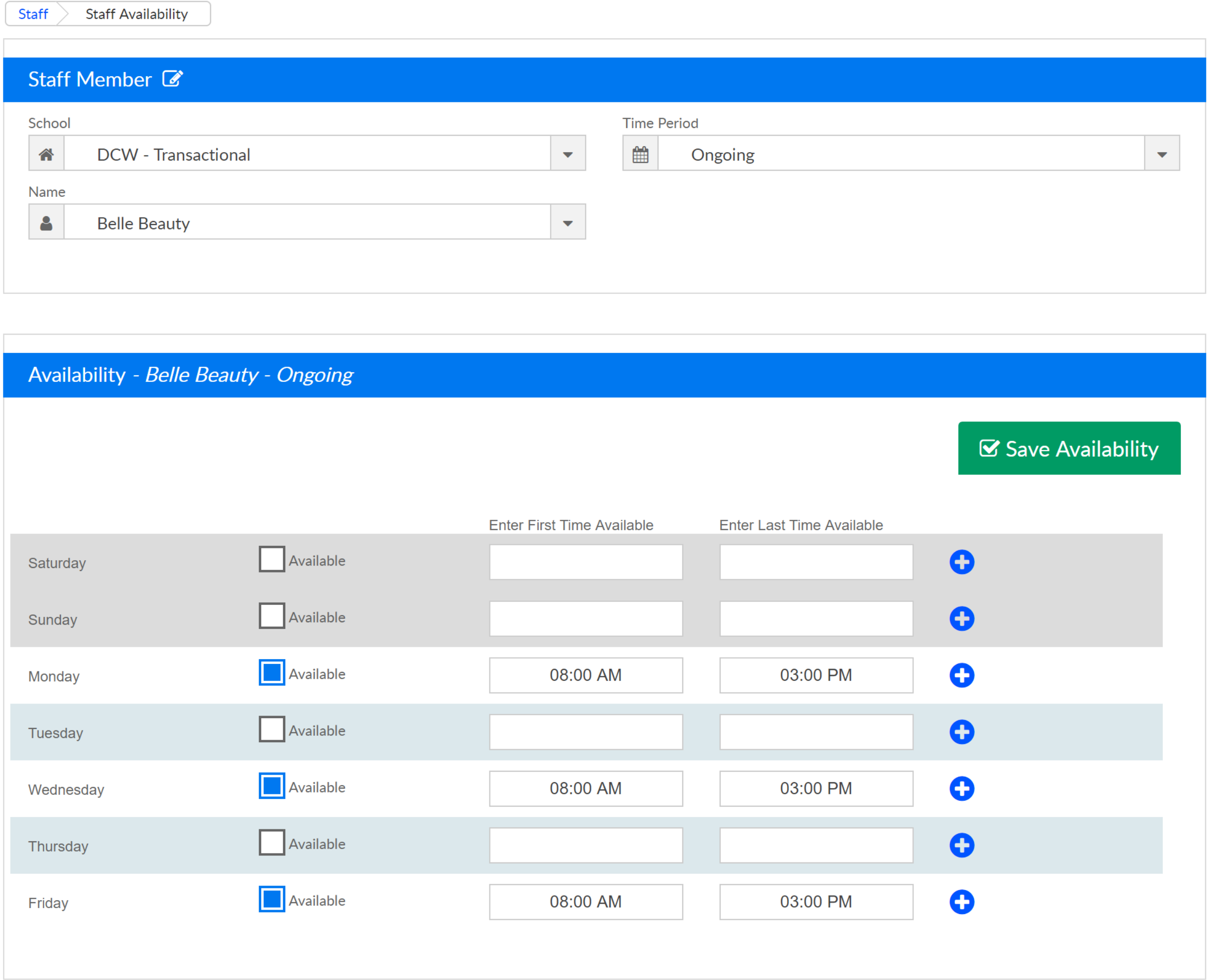
Time Period: Ongoing

Name: Belle Beauty

Availability - *Belle Beauty - Ongoing*

		Enter First Time Available	Enter Last Time Available
Saturday	☐ Available		
Sunday	☐ Available		
Monday	☐ Available		
Tuesday	☐ Available		
Wednesday	☐ Available		
Thursday	☐ Available		
Friday	☐ Available		

To mark a day a staff member is available check the Available box, then enter the First time available and the last time available.



School: DCW - Transactional

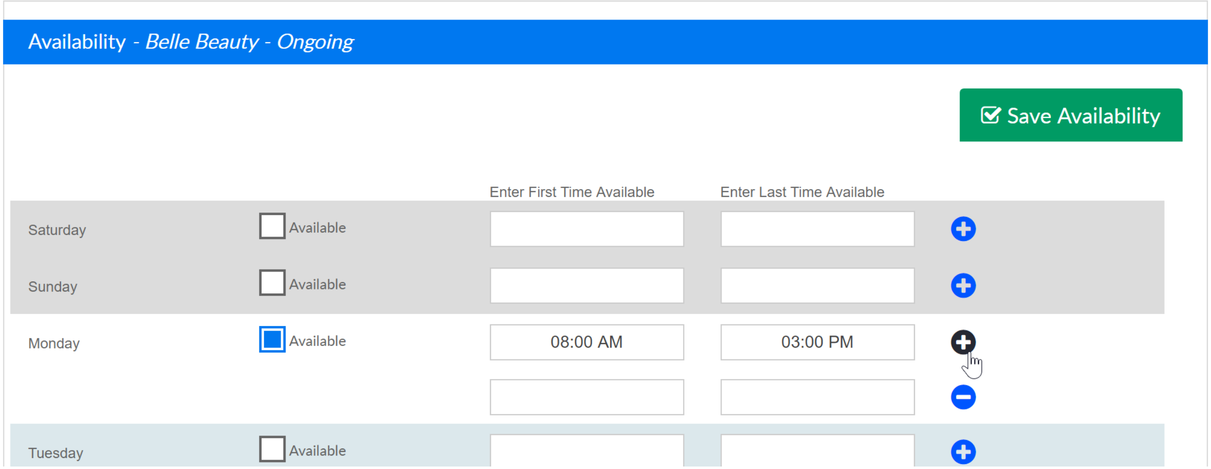
Time Period: Ongoing

Name: Belle Beauty

Availability - *Belle Beauty - Ongoing*

		Enter First Time Available	Enter Last Time Available
Saturday	☐ Available		
Sunday	☐ Available		
Monday	☑ Available	08:00 AM	03:00 PM
Tuesday	☐ Available		
Wednesday	☑ Available	08:00 AM	03:00 PM
Thursday	☐ Available		
Friday	☑ Available	08:00 AM	03:00 PM

If additional entries need to be made for a day select the blue plus button on the right side of each line. To remove the additional line from the staff member's availability record select the minus button. (If you add a new line you must enter to and from times before you are able to Save Availability)



Availability - *Belle Beauty - Ongoing*

		Enter First Time Available	Enter Last Time Available
Saturday	☐ Available		
Sunday	☐ Available		
Monday	☑ Available	08:00 AM	03:00 PM
Tuesday	☐ Available		

When entry is complete select Save Availability. Continue this process until all staff have availability schedules.

The next step in this process is to create staff schedules- from the staff menu select

Create Schedule, click here for directions.

Staff > Create Schedule

Last Modified on 06/06/2018 3:01 pm EDT

The Staff > Create Schedule screen will allow admin level users to create schedules for staff for specific classrooms/programs. This is part of the overall scheduling process for staff. There are settings for how many weeks can be adjusted on the setup > system config, Extended Config screen.

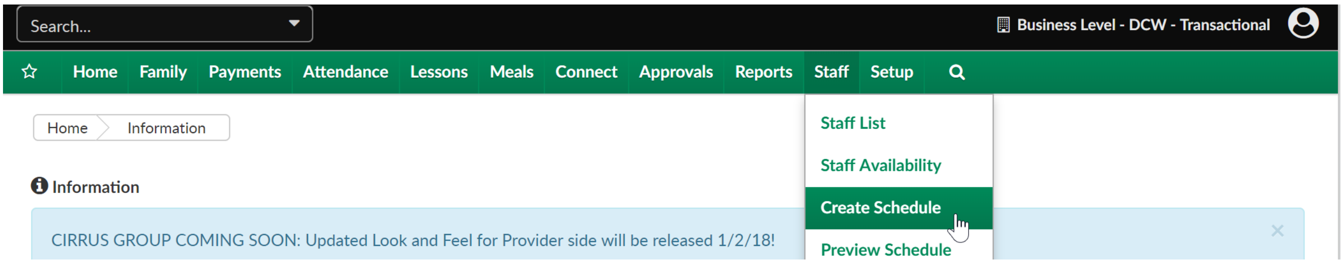
Pre-Work

In order to utilize this process, verify the below items have been setup within the system-

- Home > Hours- center hours must be current, for each day select the from and to time the center will operate.
- Staff must be setup under Staff > Staff list , be sure each staff member is associated to a specific site.
- For each role that will access labor planning options Activity IDs: 394, 395, 1059 must be set to All Permissions.
- Go to Staff > Staff Availability to setup times staff can be scheduled.

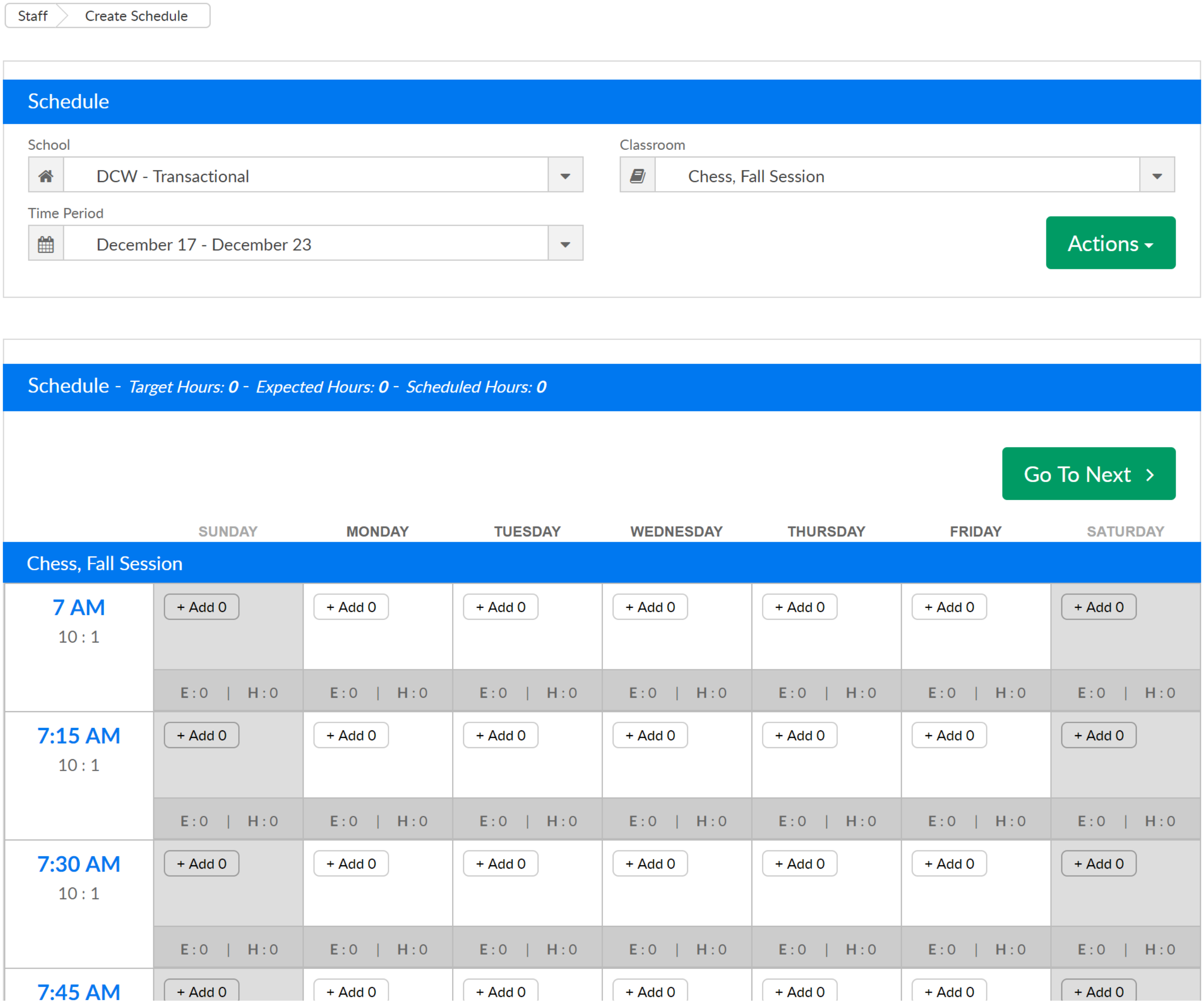
Create Schedules

After availability is in the system, the next step is to create schedules. To navigate to the correct screen go to the Staff menu and select Create Schedules.



CIRRUS GROUP COMING SOON: Updated Look and Feel for Provider side will be released 1/2/18!

Once the page loads, School, Classroom and Time Period can be selected. To copy a prior schedule to the current week select the Copy Schedule button. To copy the remaining classrooms, select Copy All Classrooms.



School: DCW - Transactional

Classroom: Chess, Fall Session

Time Period: December 17 - December 23

Schedule - *Target Hours: 0 - Expected Hours: 0 - Scheduled Hours: 0*

Chess, Fall Session

<table>
<tr><th></th><th>SUNDAY</th><th>MONDAY</th><th>TUESDAY</th><th>WEDNESDAY</th><th>THURSDAY</th><th>FRIDAY</th><th>SATURDAY</th></tr>
<tr><td>7 AM
10 : 1</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td></tr>
<tr><td>7:15 AM
10 : 1</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td></tr>
<tr><td>7:30 AM
10 : 1</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td><td>+ Add 0
E : 0 | H : 0</td></tr>
<tr><td>7:45 AM</td><td>+ Add 0</td><td>+ Add 0</td><td>+ Add 0</td><td>+ Add 0</td><td>+ Add 0</td><td>+ Add 0</td><td>+ Add 0</td></tr>
</table>

At the top of the schedule area the name of the room will display. Active center hours will display in white, hours the center is closed will display as gray on the scheduling grid.

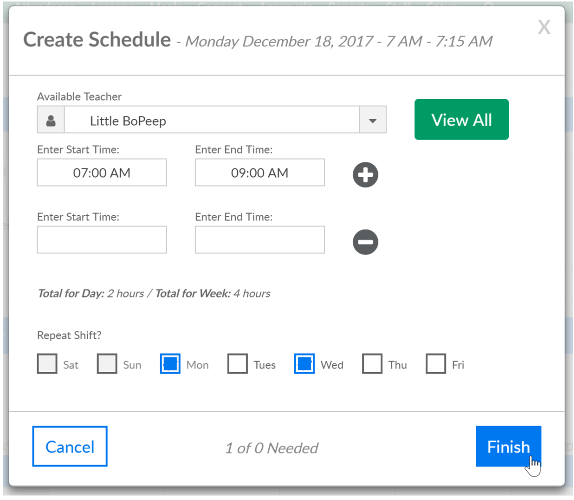
- On the very left most column the hour that is being scheduled for will display the room's student : teacher ratio (this is set at the room level).
- Under each day's column for each time's row the number of staff already scheduled will display in the add icon.
- Under the Add icon E: will display the expected (scheduled number of students) the H: will display this historical count of students (based on standard deviation of data).

To add a teacher to the room select the +Add button in line with the time and day that is being scheduled.

The create schedule box will open and display the time range that is being scheduled for.

Enter/Select:

- Available Teacher- teachers with availability will display as a default for the day and time that is being scheduled. To view ALL teachers regardless of schedule select the View All button.
  - When a teacher has been selected, times that have been added for the teacher when they are available will display in white, when the teacher is not available the time will display as gray. Teachers can be scheduled for times they have not been marked as available.
  - Teachers can only be scheduled for one classroom per time period. This means that you can only add a schedule for 7 AM on 12/18 in one classroom. If the teacher will be moving around or helping to satisfy ratio- the teacher can be moved from the admin side of the site or from the InSite Provider application throughout the day. The schedule displays expectation.
- Enter Start Time- the time the staff will begin in the room.
- Enter End Time- the time the staff will leave the room.
- Press the + button to add another schedule for the staff member in the same room, for the same week for the same days
- Total Hours for the Day and Week will display as detail is updated.



Create Schedule - *Monday December 18, 2017 - 7 AM - 7:15 AM*

Available Teacher: Little BoPeep

Enter Start Time: 07:00 AM
Enter End Time: 09:00 AM

Enter Start Time:
Enter End Time:

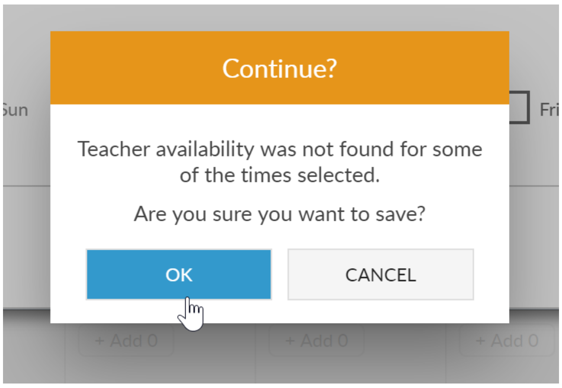
Total for Day: 2 hours / *Total for Week:* 4 hours

Repeat Shift?
☐ Sat ☐ Sun ☑ Mon ☐ Tues ☑ Wed ☐ Thu ☐ Fri

1 of 0 Needed

Once schedule detail has been added, select the finish button. As staff is added to the room the target hours, expected hours and scheduled hours will update based on entered data.

If the Staff member was not scheduled a confirmation box will display, press OK to continue or cancel to exit and make changes.

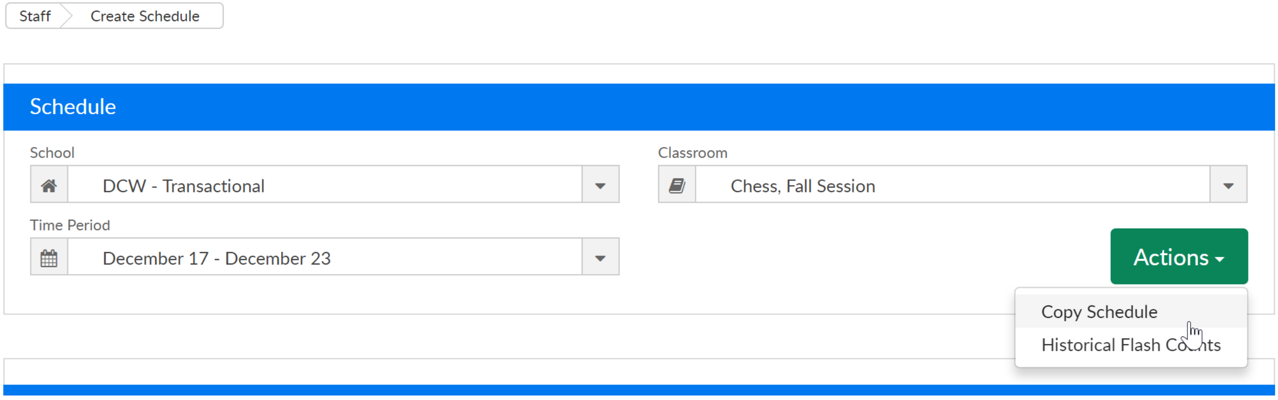


Teacher availability was not found for some of the times selected.

Are you sure you want to save?

Once a schedule has been set for a particular room for one week, that schedule can be copied to additional weeks by selecting copy schedule. (The number of available weeks to schedule for is controlled by going to setup > system config, Extended Configuration.)

Select Copy Schedule from the Actions menu-

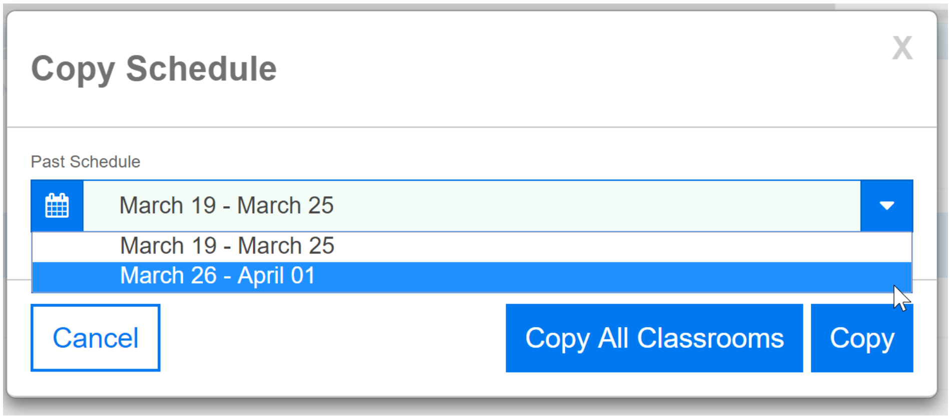


School: DCW - Transactional

Classroom: Chess, Fall Session

Time Period: December 17 - December 23

Select a particular week from the drop-down menu and then select either Copy All Classrooms (to copy all classroom schedules for the selected week) or Copy (to copy only your current classroom's schedule for the selected week).



Once all rooms have been scheduled the next step is to preview the schedule by going to Staff > Preview Schedule .

Staff > Preview Schedule

Last Modified on 06/06/2018 3:15 pm EDT

The Staff > Preview Schedule screen will allow admin level users to preview the schedules for staff for specific classrooms/programs. This is part of the overall scheduling process for staff. There are settings for how many weeks can be adjusted on the setup > system config, Extended Config screen.

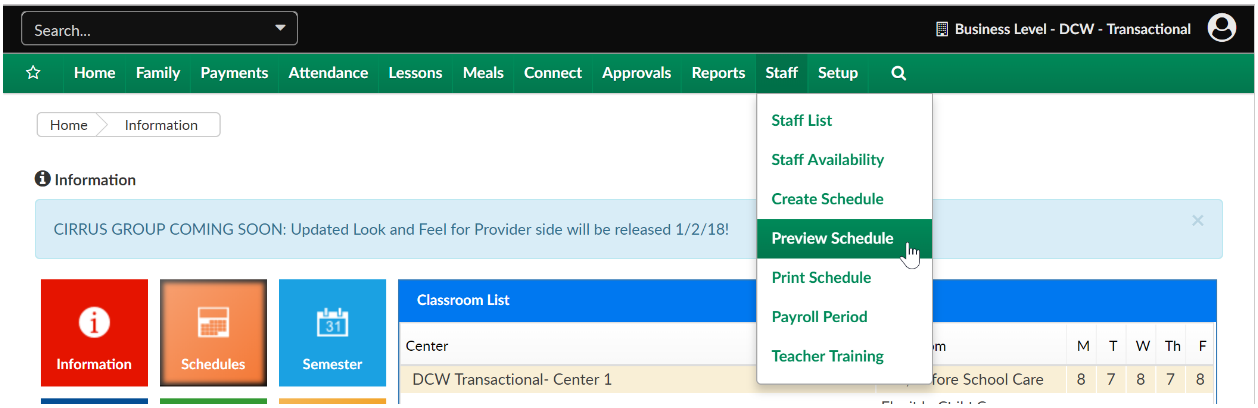
Pre-Work

In order to utilize this process, verify the below items have been setup within the system-

- Home > Hours- center hours must be current, for each day select the from and to time the center will operate.
- Staff must be setup under Staff > Staff list , be sure each staff member is associated to a specific site.
- For each role that will access labor planning options Activity IDs: 394, 395, 1059 must be set to All Permissions.
- Go to Staff > Staff Availability to setup times staff can be scheduled.
- Go to Staff > Create Schedule to setup staff schedules.

Preview the Schedule

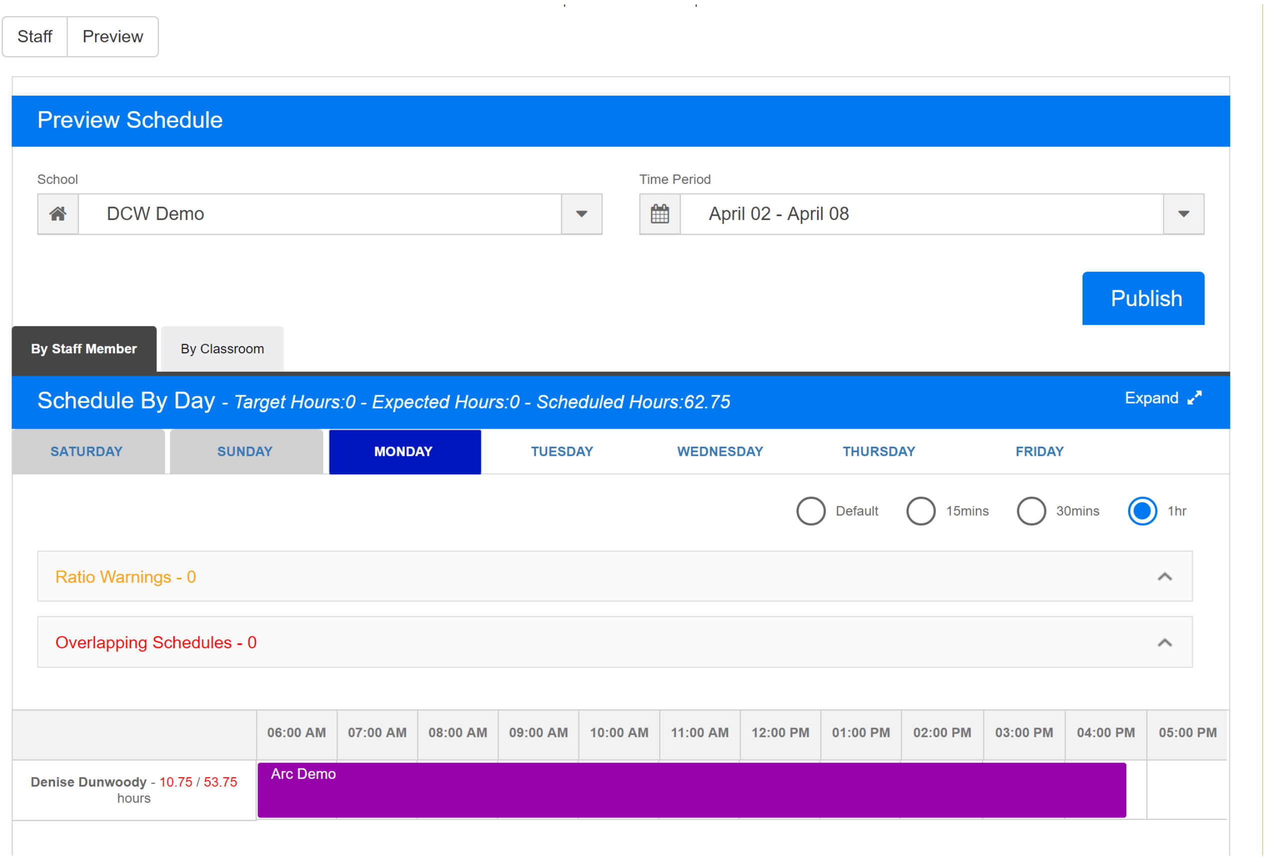
Go to Staff > Preview Schedule



CIRRUS GROUP COMING SOON: Updated Look and Feel for Provider side will be released 1/2/18!

When the screen opens, you will be able to select a particular school or site you are working on scheduling, you can select the time period as well (currently this is only created by the week).

Once a school and time period are selected the scheduled staff hours will display in the lower portion of the screen. There are two view options- by Staff Member and by Classroom.



School: DCW Demo

Time Period: April 02 - April 08

Schedule By Day - *Target Hours:0 - Expected Hours:0 - Scheduled Hours:62.75*

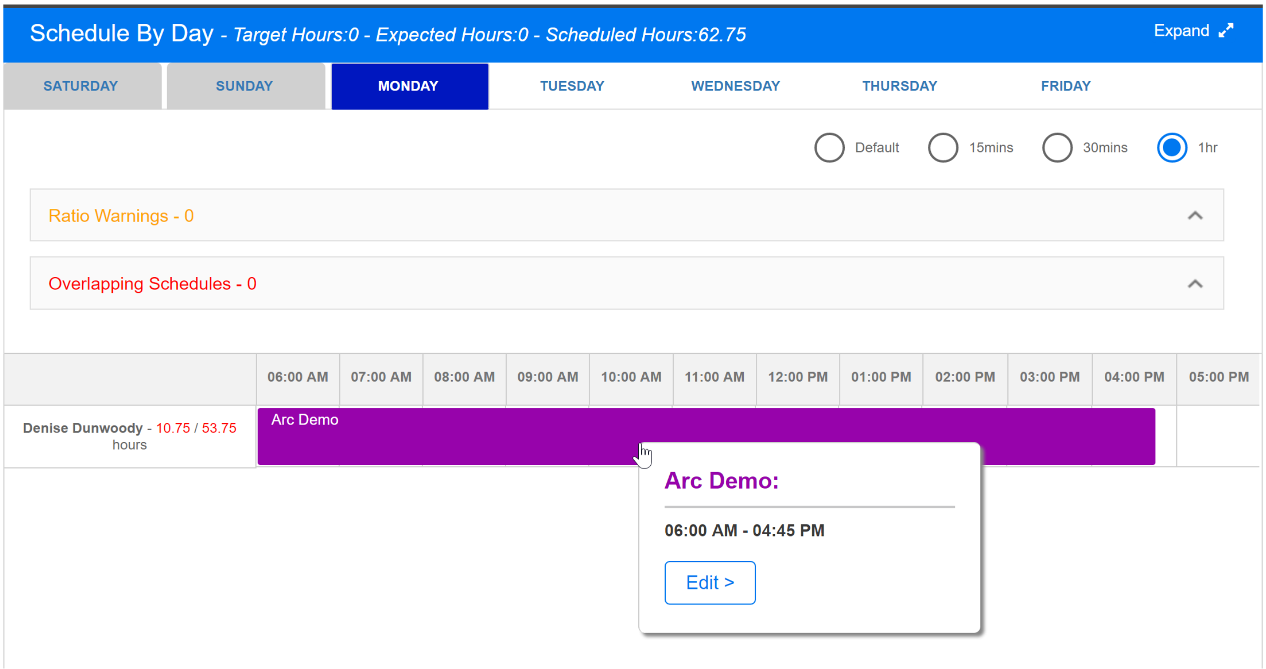
○ Default ○ 15mins ○ 30mins ● 1hr

Ratio Warnings - 0

Overlapping Schedules - 0

Denise Dunwoody - 10.75 / 53.75 hours

Edits can be made from this screen by clicking on the schedule bar for each staff member, then select Edit.



Schedule By Day - *Target Hours:0 - Expected Hours:0 - Scheduled Hours:62.75*

○ Default ○ 15mins ○ 30mins ● 1hr

Ratio Warnings - 0

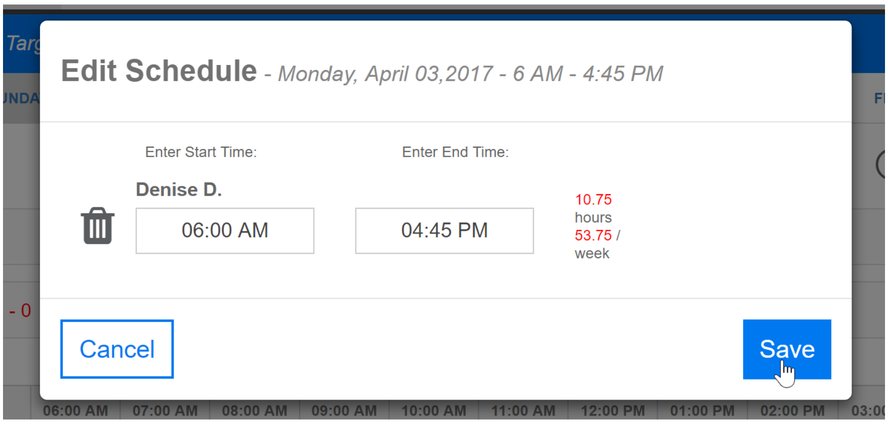
Overlapping Schedules - 0

Denise Dunwoody - 10.75 / 53.75 hours

Arc Demo:

06:00 AM - 04:45 PM

Once the edit box opens, the schedule time can be edited or deleted. Once complete select Save to save changes.



Edit Schedule - *Monday, April 03,2017 - 6 AM - 4:45 PM*

Enter Start Time: Enter End Time:

Denise D.

06:00 AM

04:45 PM

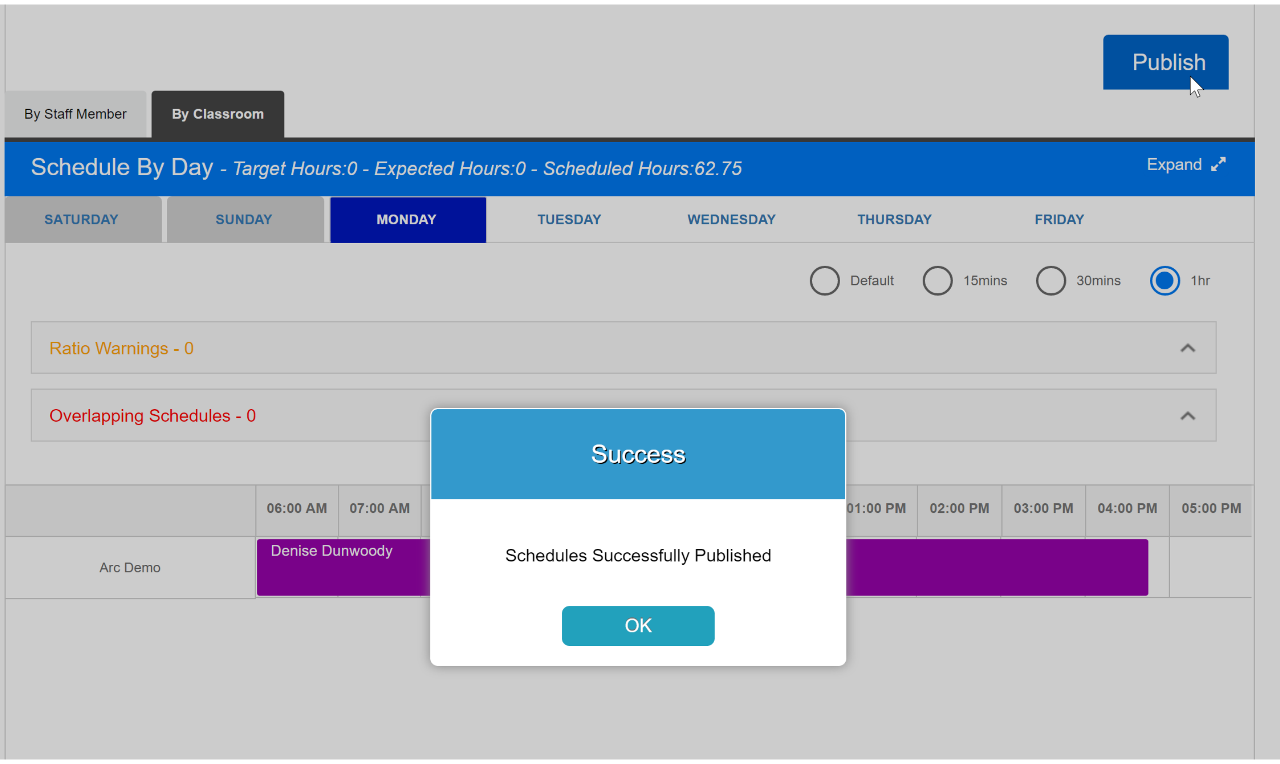
10.75 hours 53.75 / week

Any Ratio Warnings or Overlapping schedules will display in the warning boxes, if a warning existed the box could be selected to expand the warning. A schedule cannot be published when overlapping schedules are present.

Ratio Warnings - 0

Overlapping Schedules - 0

Once the warnings have been resolved and the schedules have been reviewed, select the publish button to publish the schedule.



Schedule By Day - *Target Hours:0 - Expected Hours:0 - Scheduled Hours:62.75*

Ratio Warnings - 0

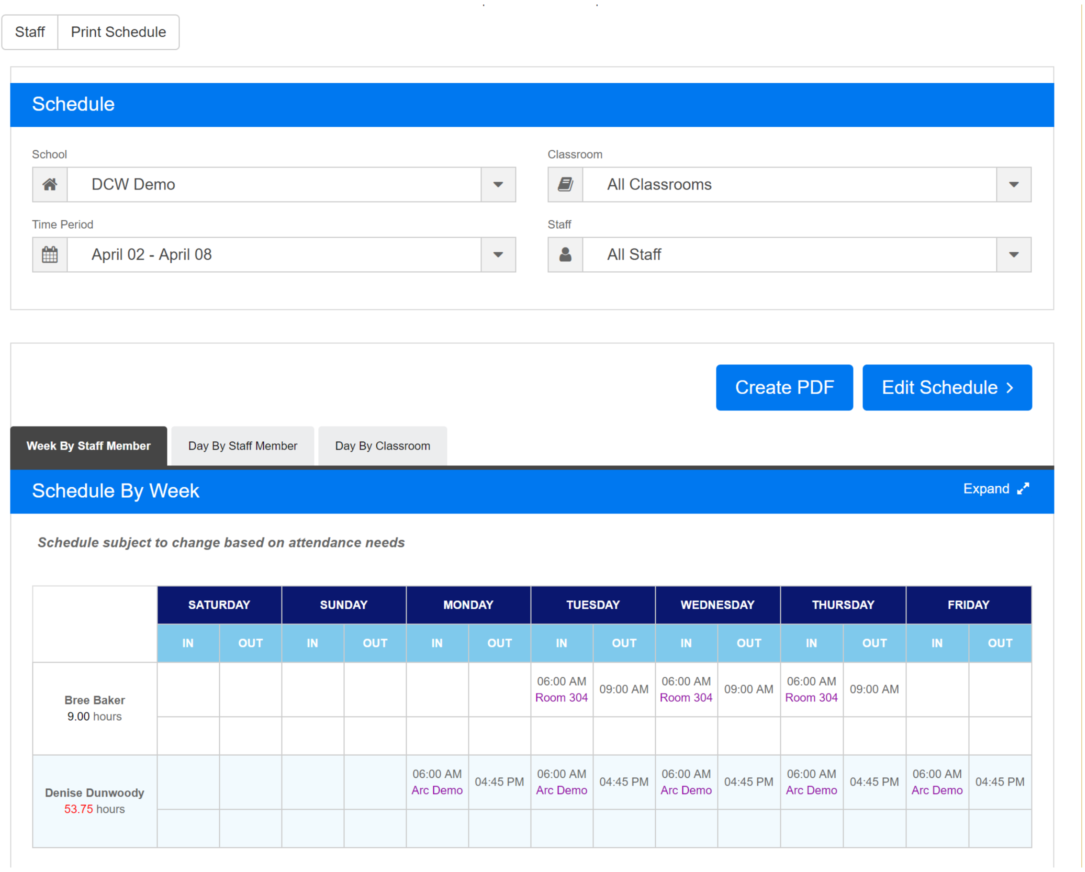
Overlapping Schedules - 0

Success

Schedules Successfully Published

After selecting Ok, the Print Schedule screen will display.

The detail displayed can be altered by selecting differing schedule criteria- school, classroom, time period or staff.



Schedule

School: DCW Demo

Classroom: All Classrooms

Time Period: April 02 - April 08

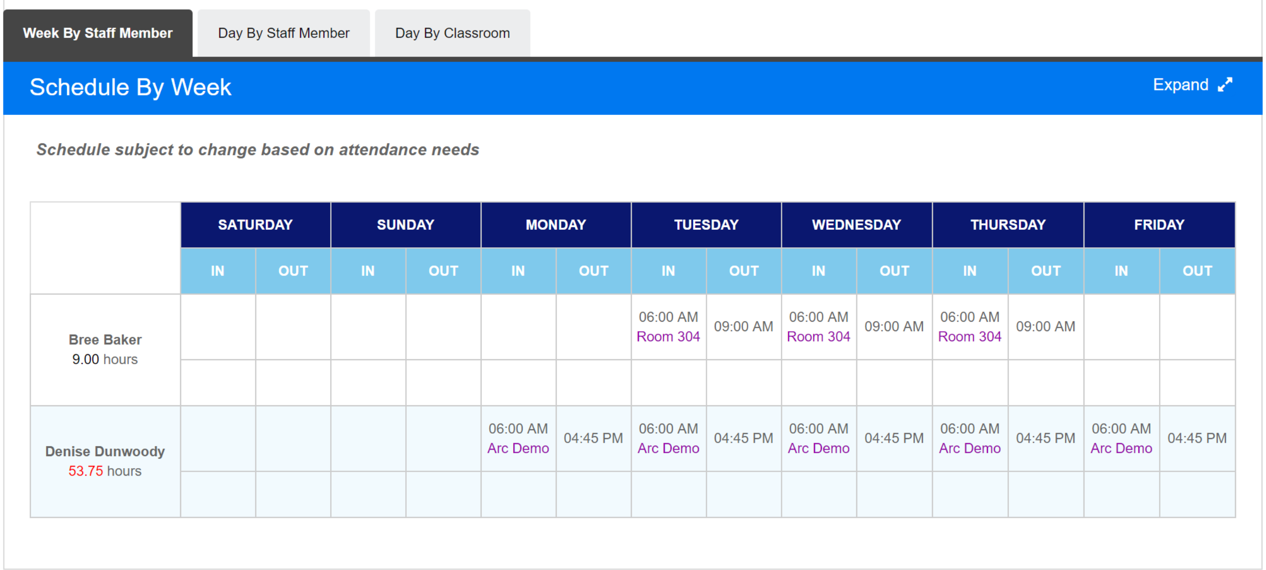
Staff: All Staff

Schedule By Week

Schedule subject to change based on attendance needs

	SATURDAY		SUNDAY		MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Bree Baker 9.00 hours							06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM		
Denise Dunwoody 53.75 hours					06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM

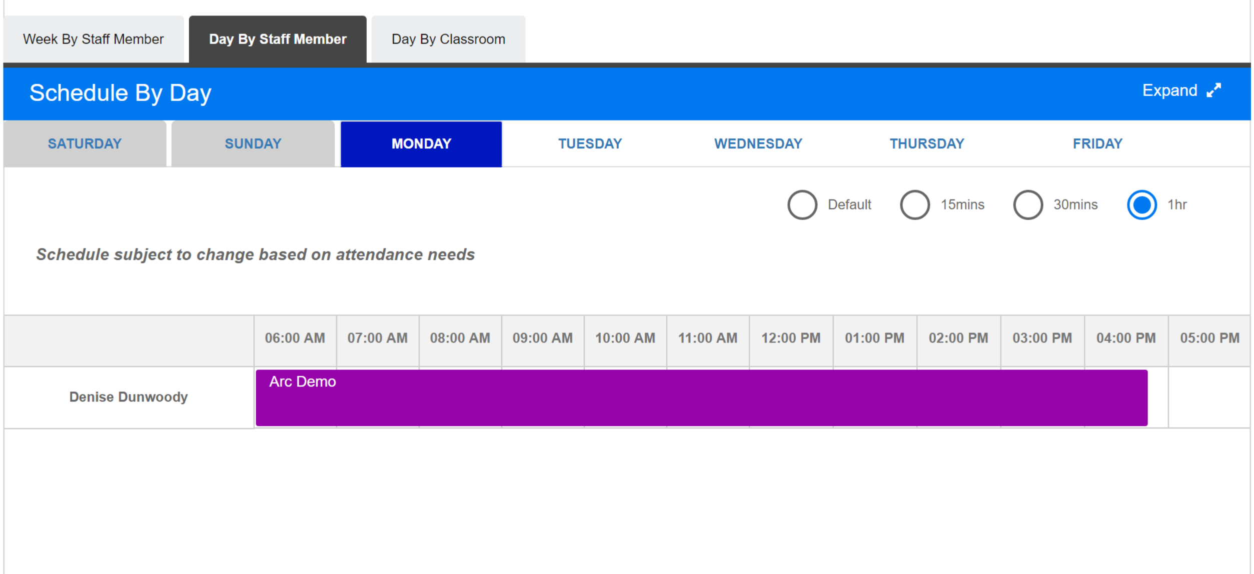
Three different views are available, Week by Staff Member, Day by Staff Member and Day by Classroom.



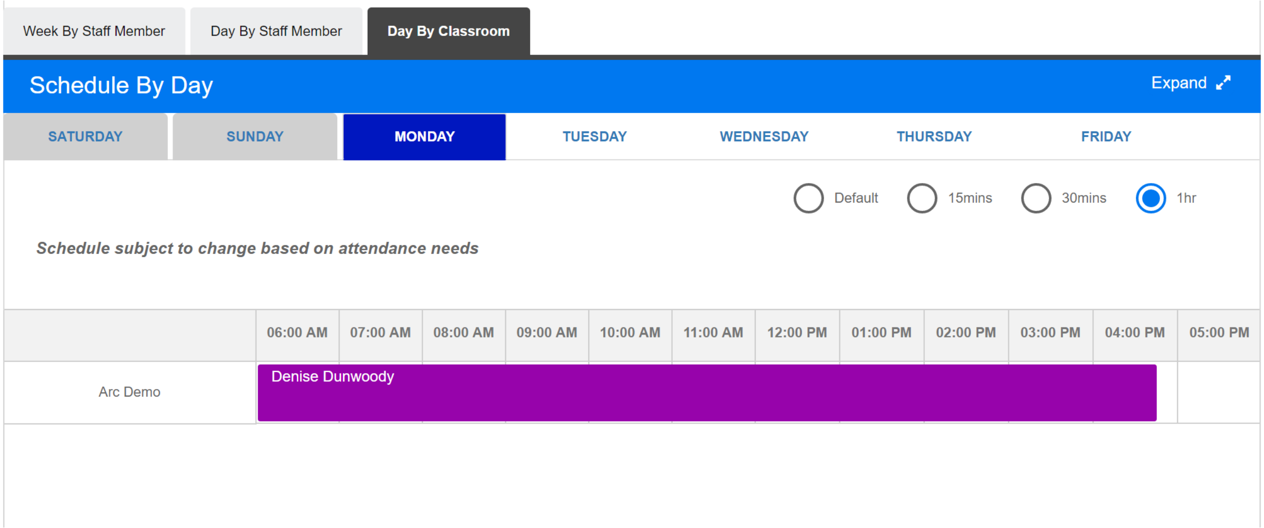
Schedule By Week

Schedule subject to change based on attendance needs

	SATURDAY		SUNDAY		MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Bree Baker 9.00 hours							06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM		
Denise Dunwoody 53.75 hours					06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM

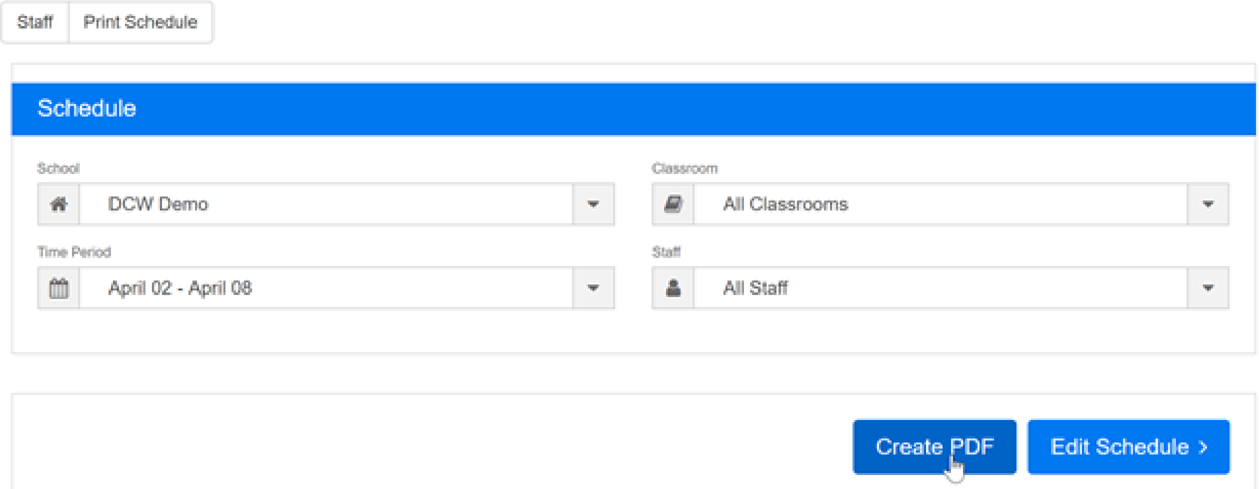


Schedule subject to change based on attendance needs



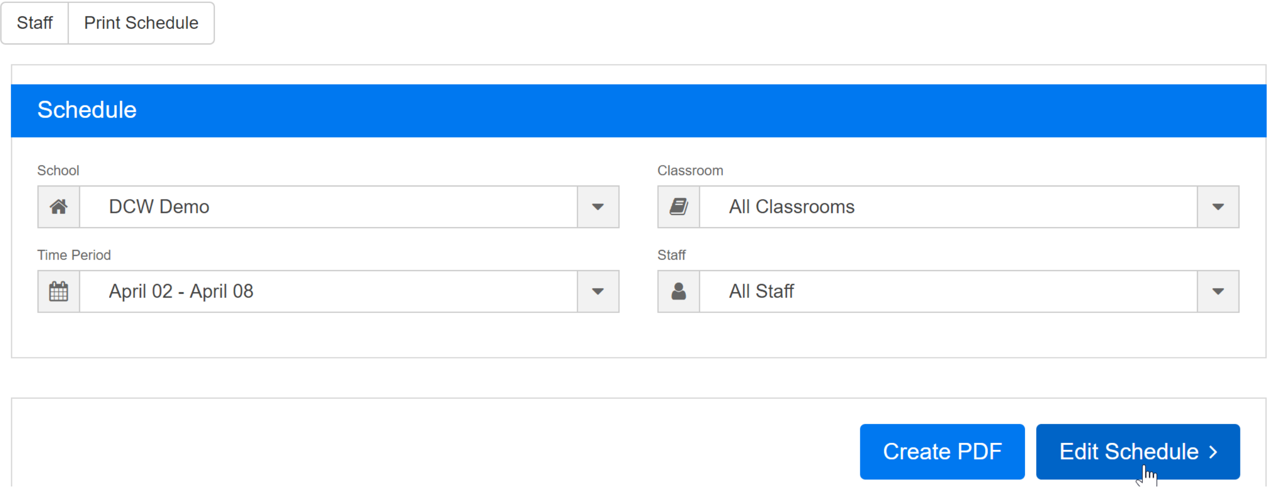
Schedule subject to change based on attendance needs

To create a PDF copy of the schedule, select the Create PDF button.



School: DCW Demo
Classroom: All Classrooms
Time Period: April 02 - April 08
Staff: All Staff

If changes need to be made to the schedule select the Edit Schedule button, this will move the schedule back to edit status. Once changes/updates have been made the schedule will need to be published again.



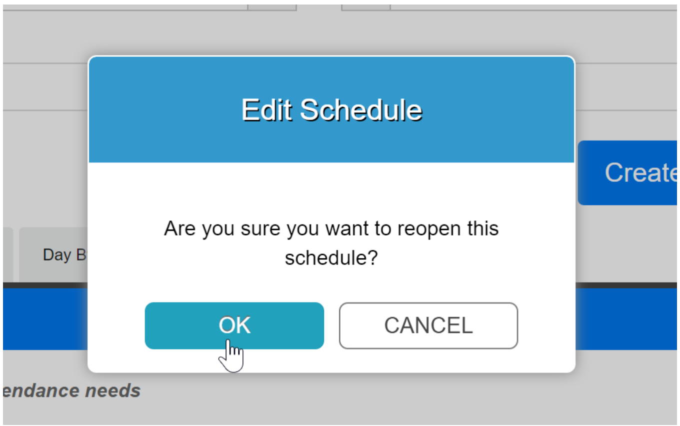
School: DCW Demo

Classroom: All Classrooms

Time Period: April 02 - April 08

Staff: All Staff

To edit the schedule press Ok, to go back without making changes select Cancel.



Edit Schedule

Are you sure you want to reopen this schedule?

Staff > Print Schedule

Last Modified on 12/21/2017 3:28 pm EST

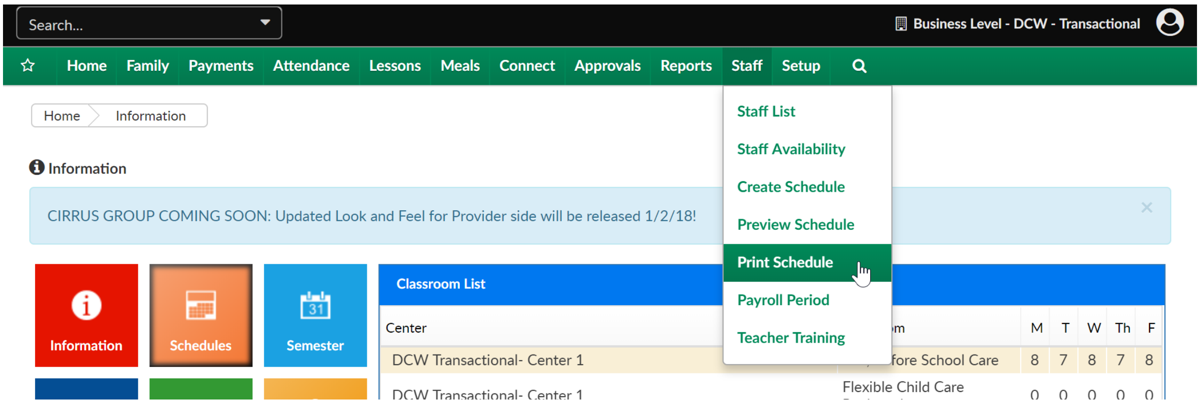
The Staff > Print Schedule screen will allow admin level users to print the schedules for staff for specific classrooms/programs. This is part of the overall scheduling process for staff. There are settings for how many weeks can be adjusted on the setup > system config, Extended Config screen.

Pre-Work

In order to utilize this process, verify the below items have been setup within the system-

- Home > Hours- center hours must be current, for each day select the from and to time the center will operate.
- Staff must be setup under Staff > Staff list , be sure each staff member is associated to a specific site.
- For each role that will access labor planning options Activity IDs: 394, 395, 1059 must be set to All Permissions.
- Go to Staff > Staff Availability to setup times staff can be scheduled.
- Go to Staff > Create Schedule to setup staff schedules.
- Go to Staff > Preview Schedule to see a collective preview of how staff have been scheduled.

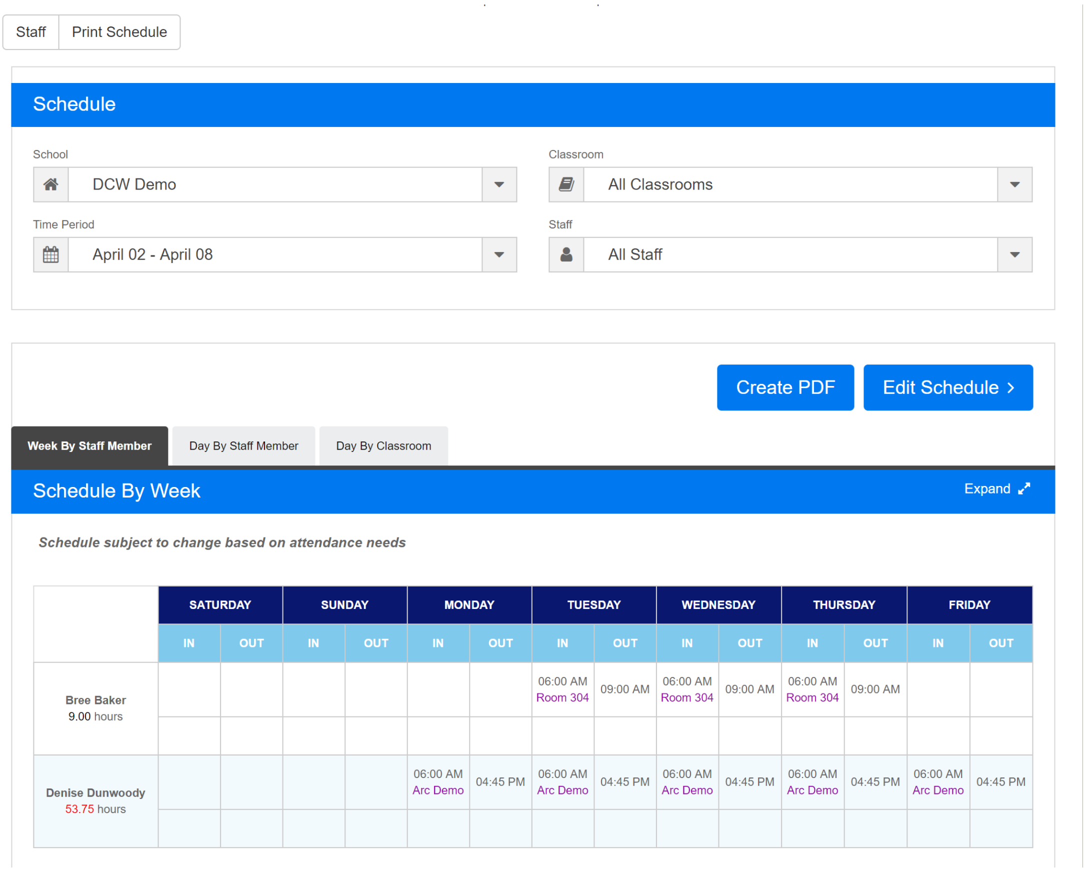
From the Staff menu, select Print Schedule option.



CIRRUS GROUP COMING SOON: Updated Look and Feel for Provider side will be released 1/2/18!

On the Print Schedule screen, select the School. Classroom. Time Period and Staff detail for the schedule that will be printed.

The detail displayed can be altered by selecting differing schedule criteria- school, classroom, time period or staff.



Schedule

School: DCW Demo

Classroom: All Classrooms

Time Period: April 02 - April 08

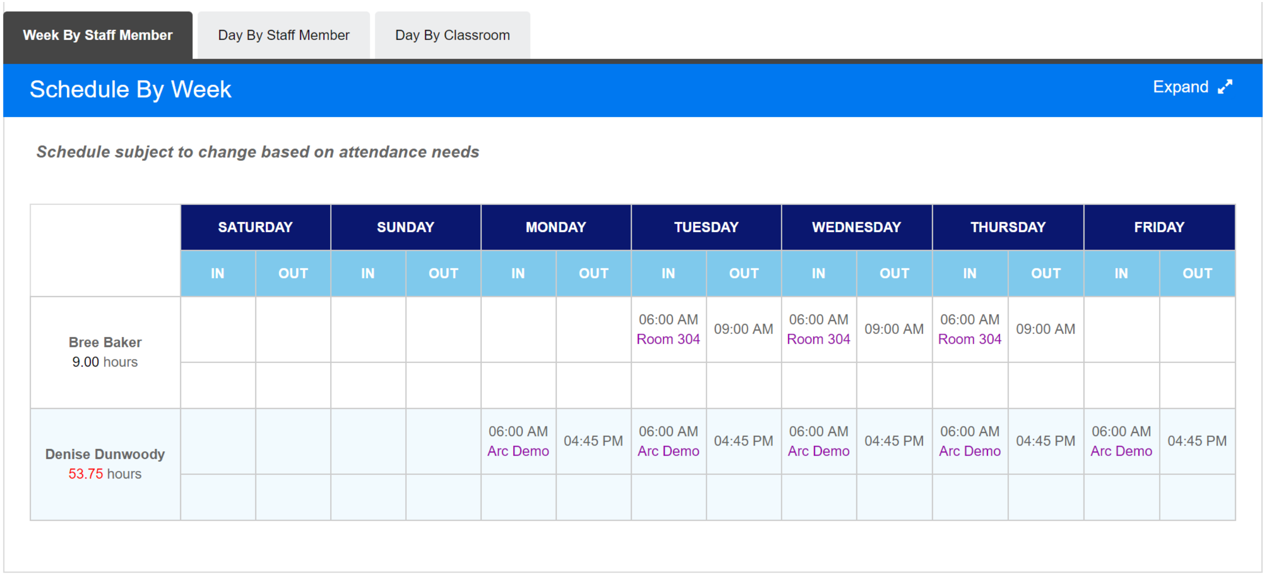
Staff: All Staff

Schedule By Week

Schedule subject to change based on attendance needs

	SATURDAY		SUNDAY		MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Bree Baker 9.00 hours							06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM		
Denise Dunwoody 53.75 hours					06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM

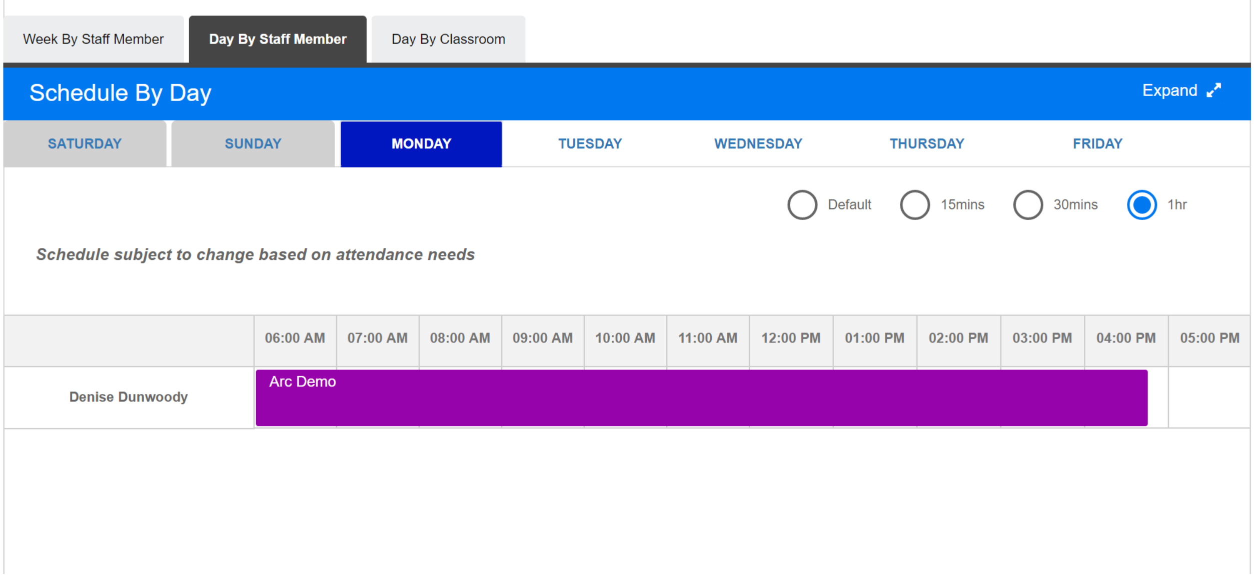
Three different admin level views are available, Week by Staff Member, Day by Staff Member and Day by Classroom.



Schedule By Week

Schedule subject to change based on attendance needs

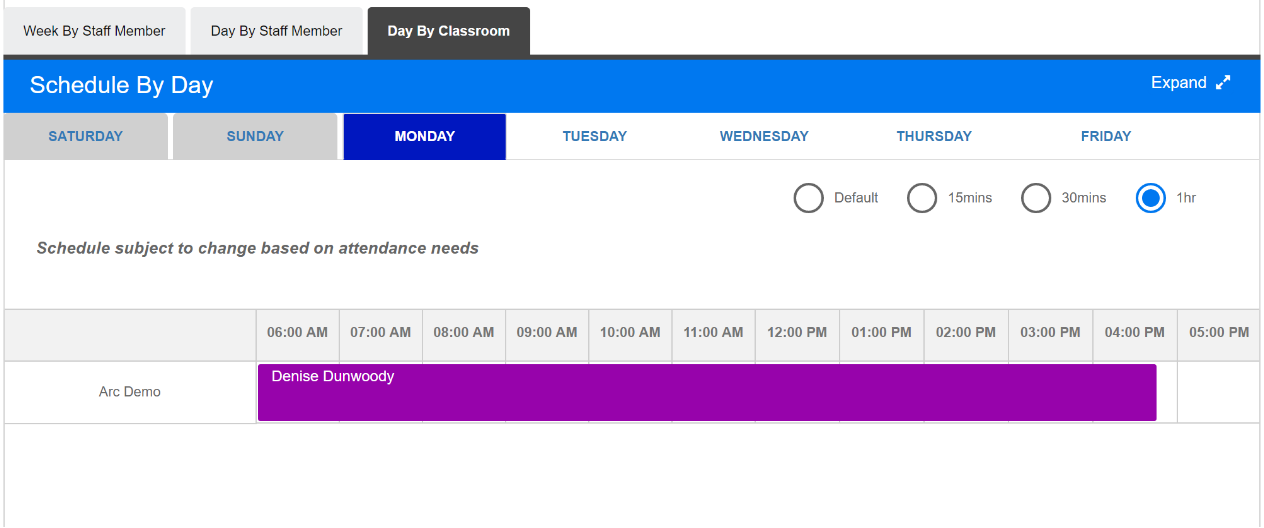
	SATURDAY		SUNDAY		MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY	
	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Bree Baker 9.00 hours							06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM	06:00 AM Room 304	09:00 AM		
Denise Dunwoody 53.75 hours					06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM	06:00 AM Arc Demo	04:45 PM



○ Default ○ 15mins ○ 30mins ● 1hr

Schedule subject to change based on attendance needs

	06:00 AM	07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM	01:00 PM	02:00 PM	03:00 PM	04:00 PM	05:00 PM
Denise Dunwoody	Arc Demo											

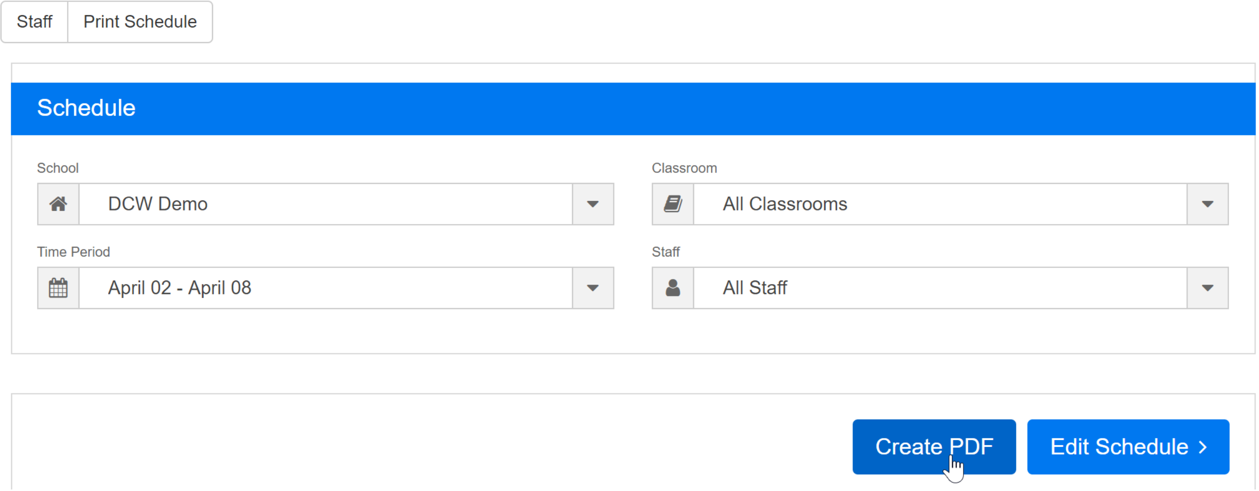


○ Default ○ 15mins ○ 30mins ● 1hr

Schedule subject to change based on attendance needs

	06:00 AM	07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM	01:00 PM	02:00 PM	03:00 PM	04:00 PM	05:00 PM
Arc Demo	Denise Dunwoody											

To create a PDF copy of the schedule, select the Create PDF button.



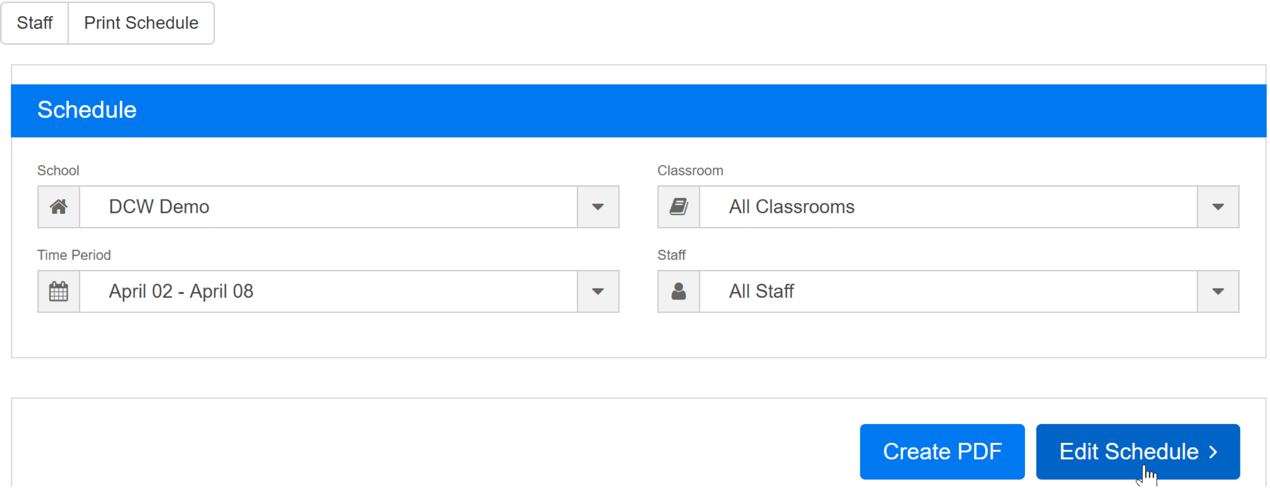
School: DCW Demo

Classroom: All Classrooms

Time Period: April 02 - April 08

Staff: All Staff

If changes need to be made to the schedule select the Edit Schedule button, this will move the schedule back to edit status. Once changes/updates have been made the schedule will need to be published again.



Schedule

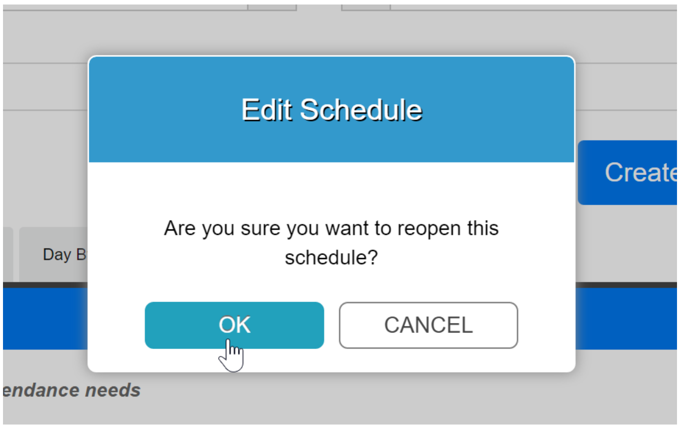
School: DCW Demo

Classroom: All Classrooms

Time Period: April 02 - April 08

Staff: All Staff

To edit the schedule press OK, to go back without making changes select Cancel.



Edit Schedule

Are you sure you want to reopen this schedule?

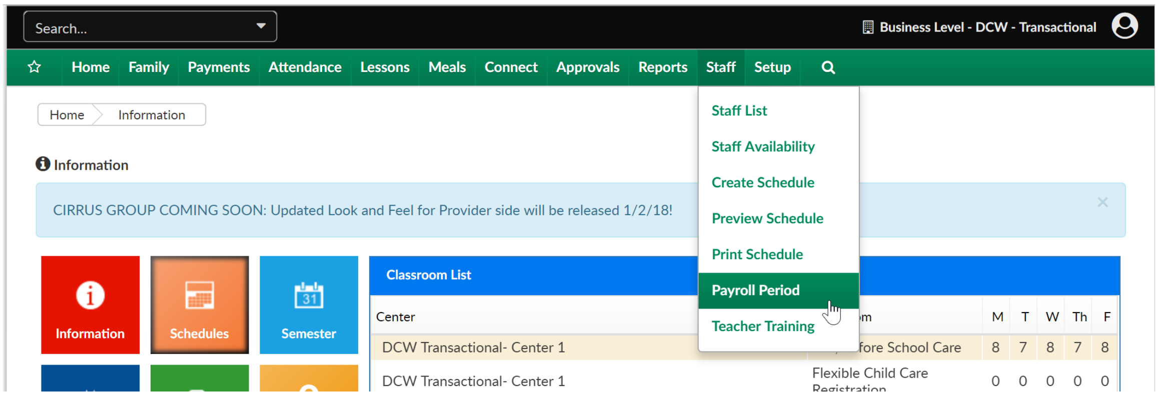
If the schedule is going to edited again, the system will take you back to theStaff > Schedule screen. Once schedules have been updated go to the Staff > Preview Schedule to complete and Staff > Print Schedule to create a PDF.

Staff > Payroll Period

Last Modified on 12/21/2017 3:45 pm EST

The Staff > Payroll Period area allows users to setup payroll periods, this is mostly used when the Payroll integration has been purchased and batch data will be passing from the system to a payroll processor.

From the Staff menu, select the Payroll Period option-

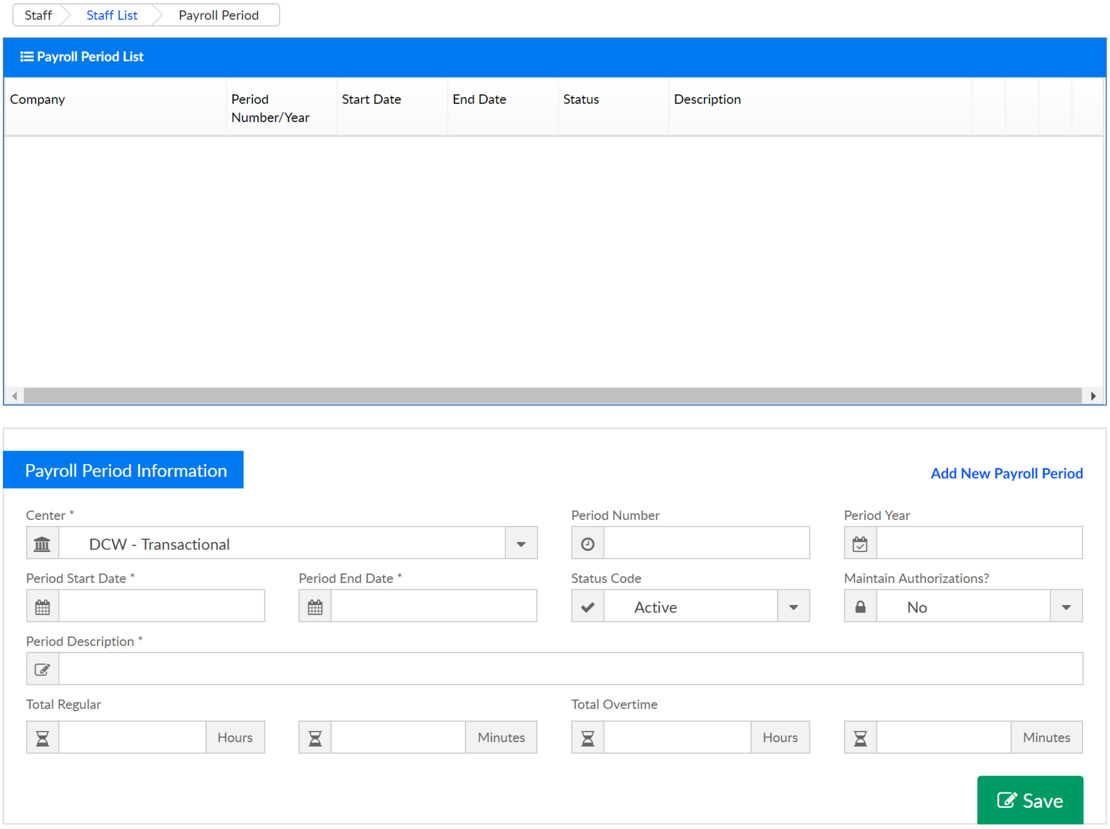


CIRRUS GROUP COMING SOON: Updated Look and Feel for Provider side will be released 1/2/18!

Center	m	M	T	W	Th	F
DCW Transactional- Center 1	fore School Care	8	7	8	7	8
DCW Transactional- Center 1	Flexible Child Care Registration	0	0	0	0	0

On the Payroll Period screen the Payroll Period List will display with any existing periods. To add a new payroll period select the Add New Payroll Period link. When adding a new payroll period the following fields can be added-

- Center
- Period Number
- Period Year
- Period Start Date
- Period End Date
- Status Code
- Maintain Authorizations
- Period Description
- Total Regular- Hours
- Total Regular- Minutes
- Total Overtime- Hours
- Total Overtime- Minutes


Staff > Staff List > Payroll Period

Payroll Period List

Company	Period Number/Year	Start Date	End Date	Status	Description

Payroll Period Information

Add New Payroll Period

Center *: DCW - Transactional

Period Number:

Period Year:

Period Start Date *:

Period End Date *:

Status Code: Active

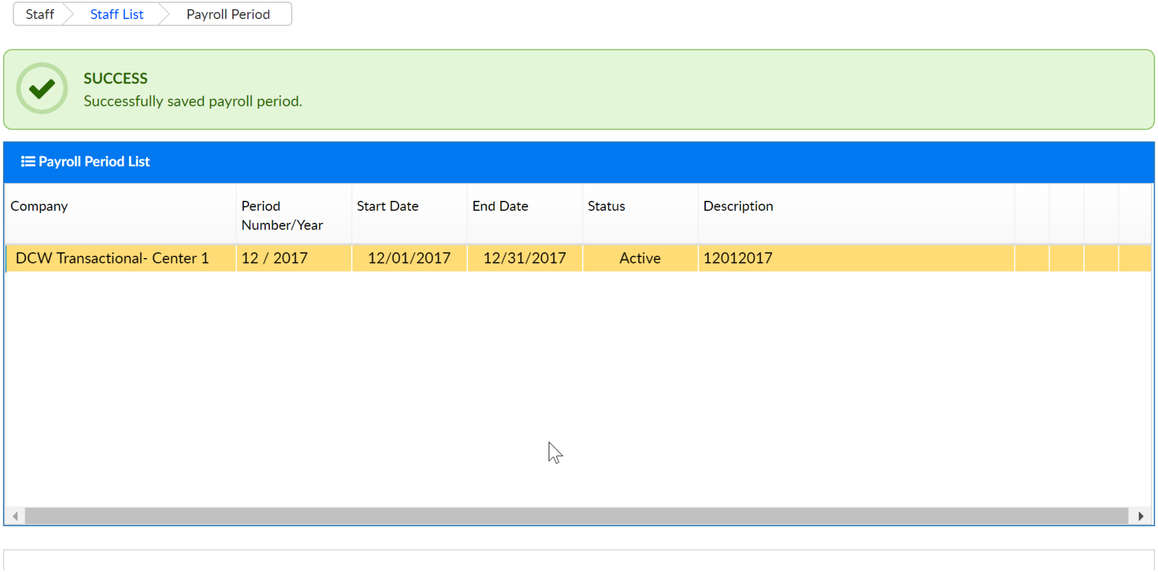
Maintain Authorizations?: No

Period Description *:

Total Regular: Hours, Minutes

Total Overtime: Hours, Minutes

Once a period has been added to the system and is active, it cannot be deleted or changed.


Staff > Staff List > Payroll Period

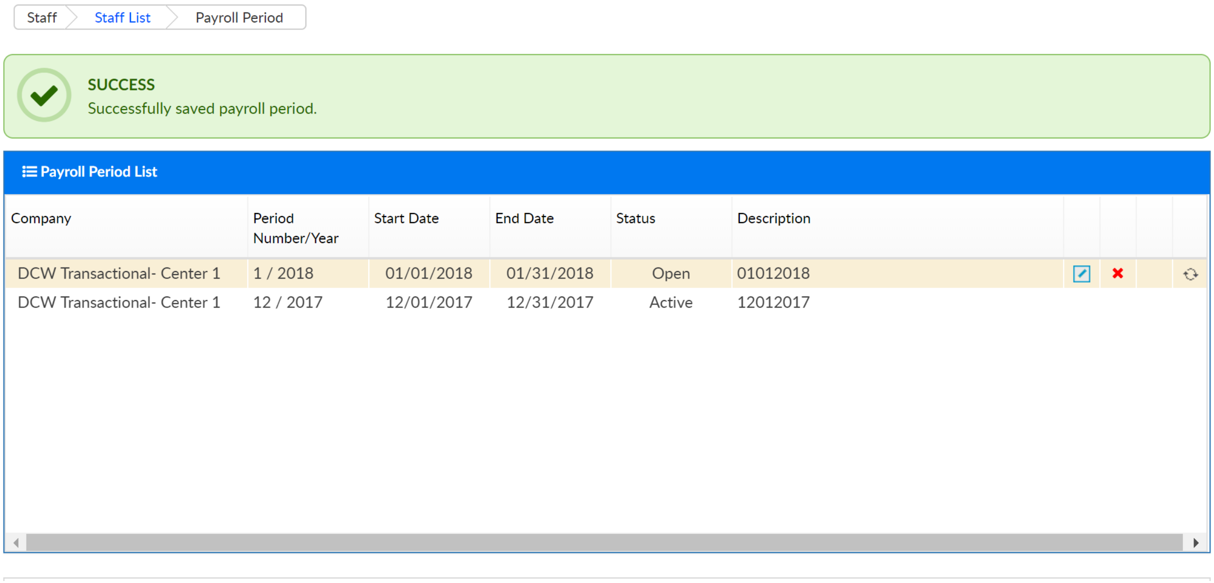
SUCCESS
Successfully saved payroll period.

Payroll Period List

Company	Period Number/Year	Start Date	End Date	Status	Description
DCW Transactional- Center 1	12 / 2017	12/01/2017	12/31/2017	Active	12012017

If a period is Open the detail can be changed, removed or cloned-

- To edit select the green square icon
- To remove select the red x icon

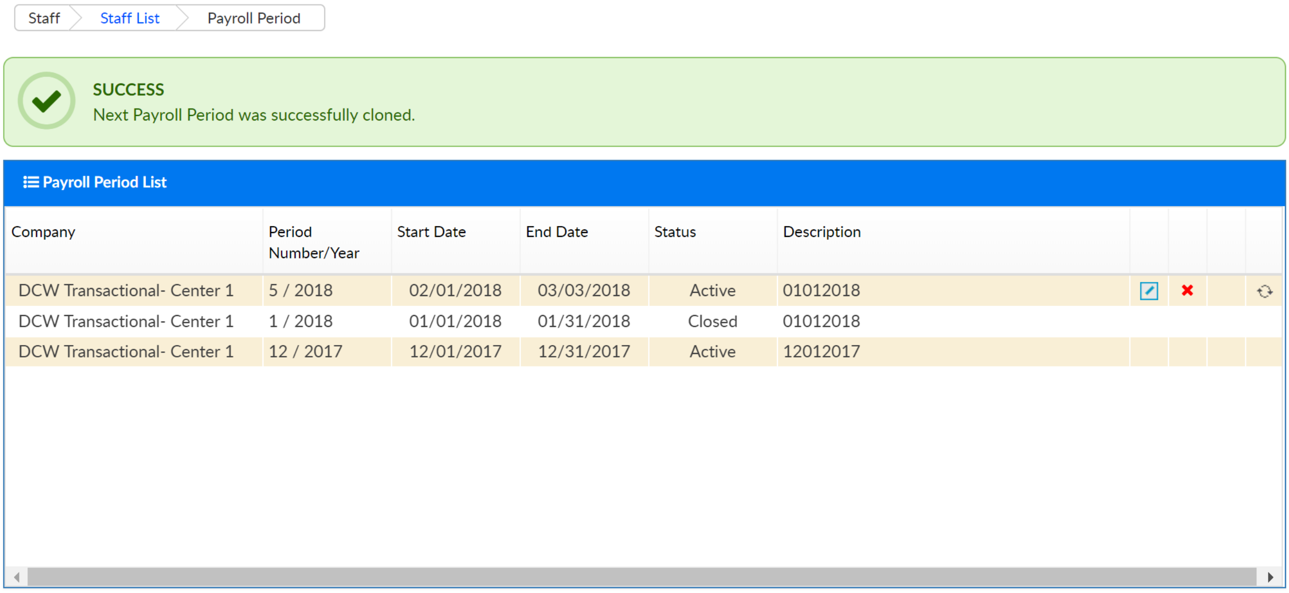


SUCCESS
Successfully saved payroll period.

Payroll Period List

Company	Period Number/Year	Start Date	End Date	Status	Description				
DCW Transactional- Center 1	1 / 2018	01/01/2018	01/31/2018	Open	01012018	✎	✖		⟳
DCW Transactional- Center 1	12 / 2017	12/01/2017	12/31/2017	Active	12012017				

- To clone select the circle icon- as soon as the period is cloned, the prior period will display as Closed and the new period will display as open



SUCCESS
Next Payroll Period was successfully cloned.

Payroll Period List

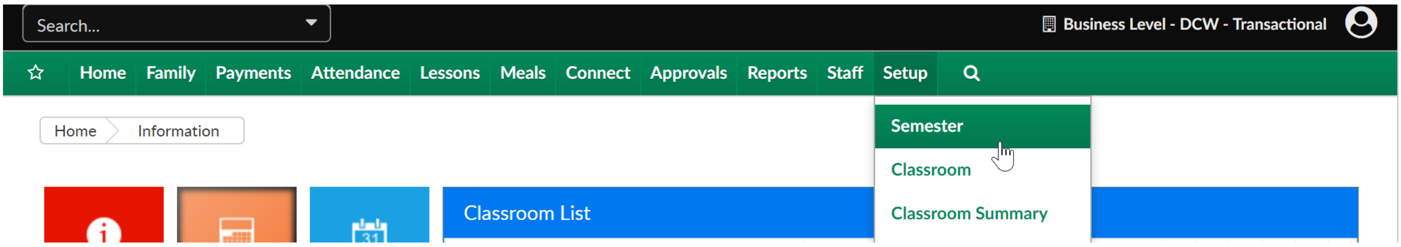
Company	Period Number/Year	Start Date	End Date	Status	Description				
DCW Transactional- Center 1	5 / 2018	02/01/2018	03/03/2018	Active	01012018	✎	✖		⟳
DCW Transactional- Center 1	1 / 2018	01/01/2018	01/31/2018	Closed	01012018				
DCW Transactional- Center 1	12 / 2017	12/01/2017	12/31/2017	Active	12012017				

Semester Summary

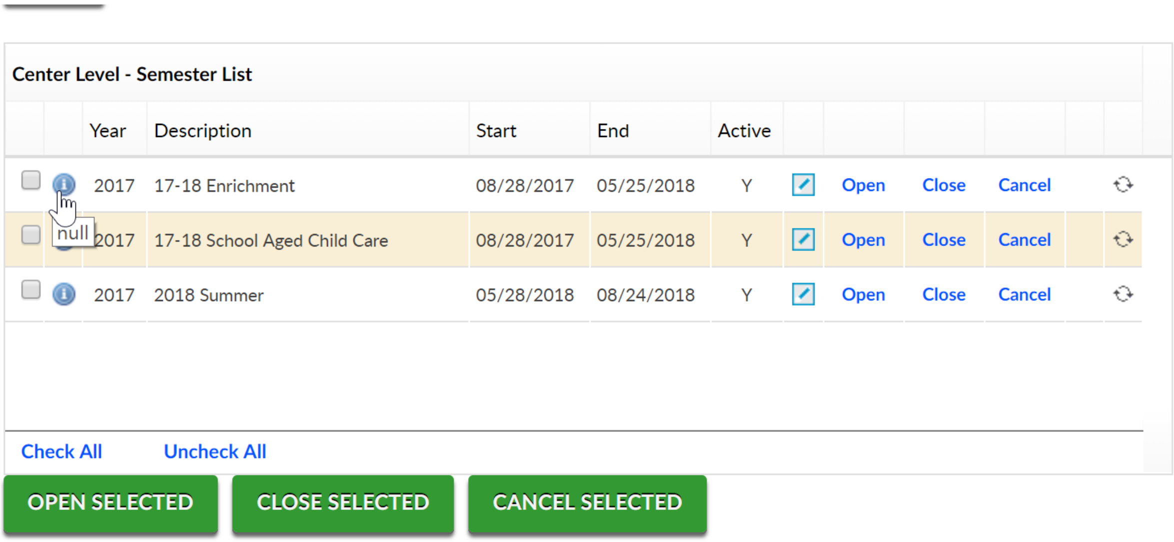
Last Modified on 03/14/2018 9:31 am EDT

The Semester Summary page allows users to see which room/site associations have been added to each semester.

To navigate to this page go to Setup > Semester.



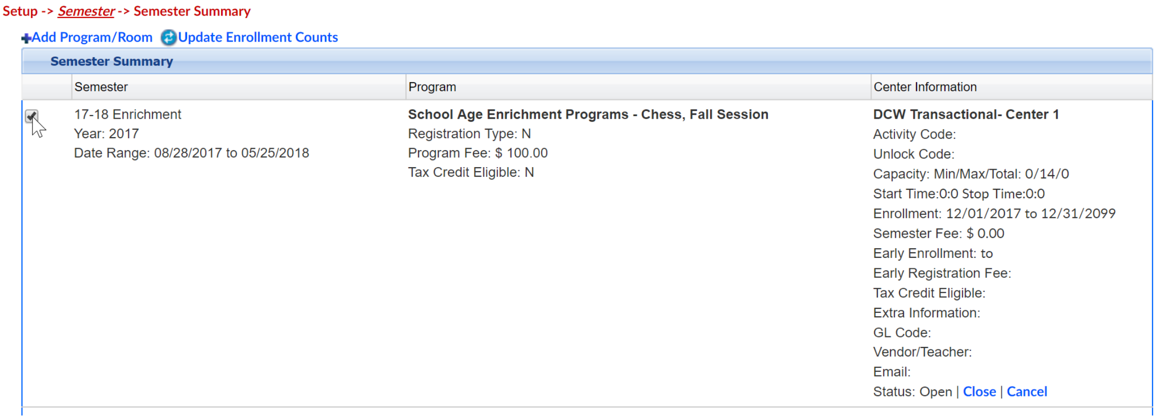
Scroll to the bottom of the page and click the blue i next to the semester name.



Center Level - Semester List

		Year	Description	Start	End	Active					
☐	ⓘ	2017	17-18 Enrichment	08/28/2017	05/25/2018	Y	✎	Open	Close	Cancel	↻
☐	ⓘ	2017	17-18 School Aged Child Care	08/28/2017	05/25/2018	Y	✎	Open	Close	Cancel	↻
☐	ⓘ	2017	2018 Summer	05/28/2018	08/24/2018	Y	✎	Open	Close	Cancel	↻

If information needs to be updated, select the room/semester/site association's checkbox on the left side, then scroll to the bottom of the screen and select the Actions drop down menu.

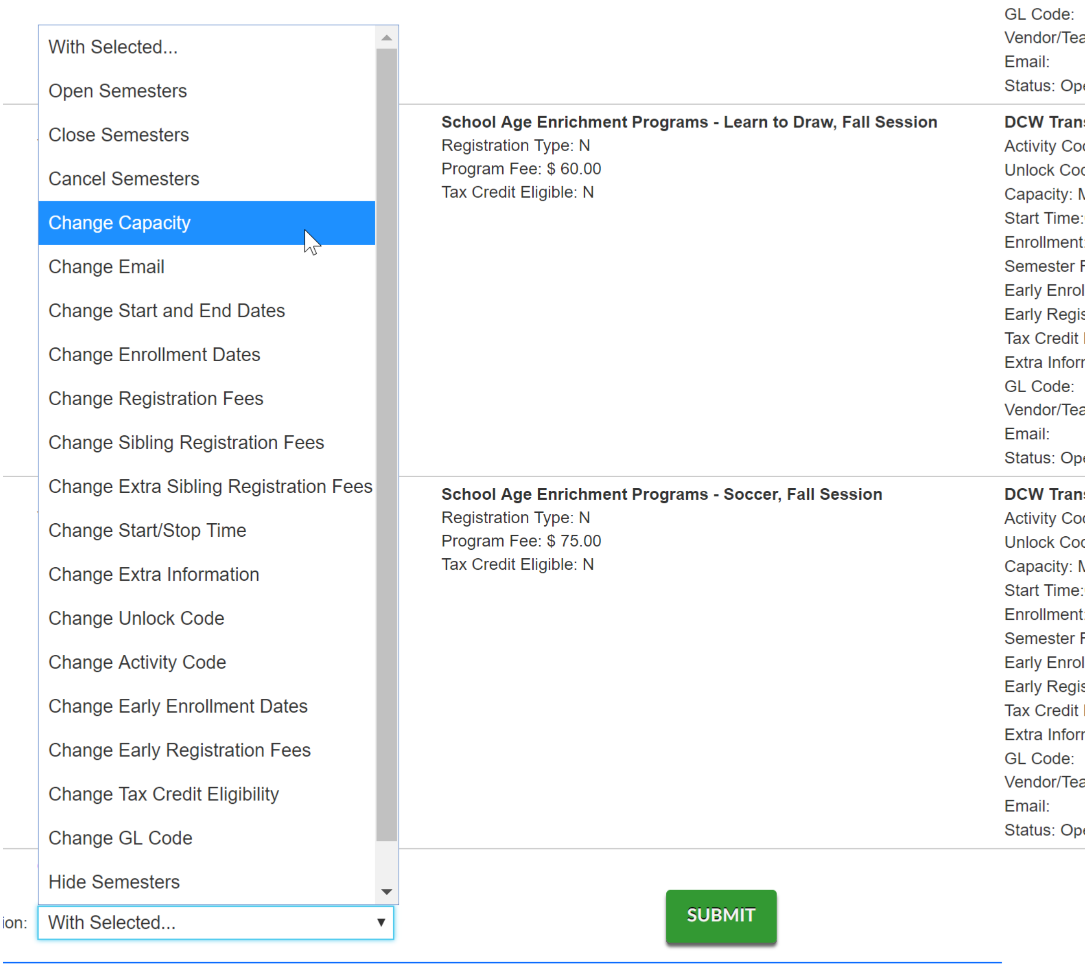


Semester Summary

	Semester	Program	Center Information
☑	17-18 Enrichment Year: 2017 Date Range: 08/28/2017 to 05/25/2018	**School Age Enrichment Programs - Chess, Fall Session** Registration Type: N Program Fee: $ 100.00 Tax Credit Eligible: N	**DCW Transactional- Center 1** Activity Code: Unlock Code: Capacity: Min/Max/Total: 0/14/0 Start Time:0:0 Stop Time:0:0 Enrollment: 12/01/2017 to 12/31/2099 Semester Fee: $ 0.00 Early Enrollment: to Early Registration Fee: Tax Credit Eligible: Extra Information: GL Code: Vendor/Teacher: Email: Status: Open | Close | Cancel

Once an Action has been selected enter the update and press Save. The detail will update in each room/semester/site association. The detail edited here will override room and view semester settings.

For example to update Capacity select Change Capacity from the Actions drop down menu-



GL Code:
Vendor/Tea
Email:
Status: Op

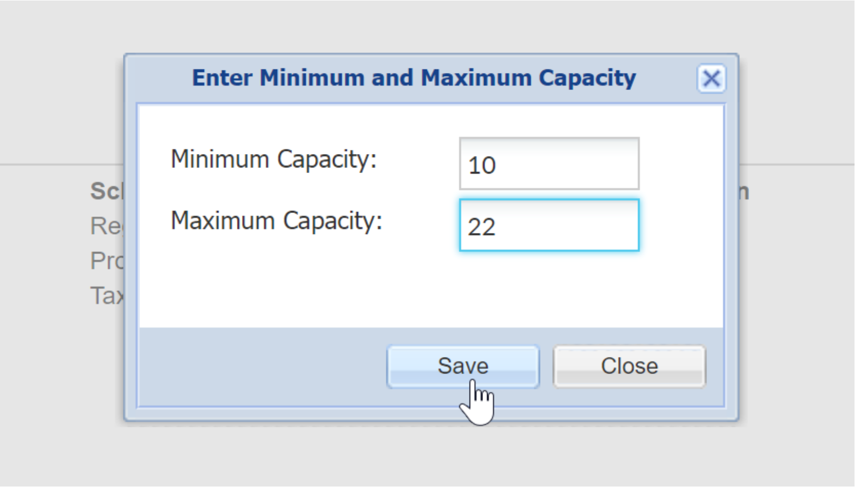
School Age Enrichment Programs - Learn to Draw, Fall Session
Registration Type: N
Program Fee: $ 60.00
Tax Credit Eligible: N

DCW Tran
Activity Co
Unlock Co
Capacity: N
Start Time:
Enrollment
Semester F
Early Enrol
Early Regis
Tax Credit
Extra Infor
GL Code:
Vendor/Tea
Email:
Status: Op

School Age Enrichment Programs - Soccer, Fall Session
Registration Type: N
Program Fee: $ 75.00
Tax Credit Eligible: N

DCW Tran
Activity Co
Unlock Co
Capacity: N
Start Time:
Enrollment
Semester F
Early Enrol
Early Regis
Tax Credit
Extra Infor
GL Code:
Vendor/Tea
Email:
Status: Op

Then enter minimum and/or maximum capacity and press Save.



Minimum Capacity: 10
Maximum Capacity: 22

From the Actions menu the below detail can be updated or changed-

- Open Semesters- opens semesters for registration
- Close Semesters- closes semesters for registration, rooms will still display on the registration screen
- Cancel Semesters- cancels semesters for registration, rooms will still display on the registration screen
- Change Capacity- allows users to update min/max capacity on rooms
- Change Email- updates email found on Setup > Room, View Semester screen
- Change Start and End Dates- updates the program start and stop dates found on Setup > Room, View Semester screen
- Change Enrollment Dates- updates the registration/enrollment start and stop dates found on Setup > Room, View Semester screen
- Change Registration Fees- Updates registration cost at the room/semester level
- Change Sibling Registration Fees- Updates sibling's registration cost at the room/semester level
- Change Extra Sibling Registration Fees- Updates additional sibling's registration cost at the room/semester level
- Change Start/Stop Time- updates the registration start/stop times at the Setup > Room, View Semester level
- Change Extra Information
- Change Unlock Code- updates the unlock code for selected room/semester pairings
- Change Early Enrollment Dates- updates the early registration/enrollment start and stop dates found on Setup > Room, View Semester screen
- Change Early Registration Fees- updates the early registration cost at the room/semester level
- Change Tax Credit Eligibility
- Change GL Code
- Hide Semesters
- Show Semesters

Setup > Semester

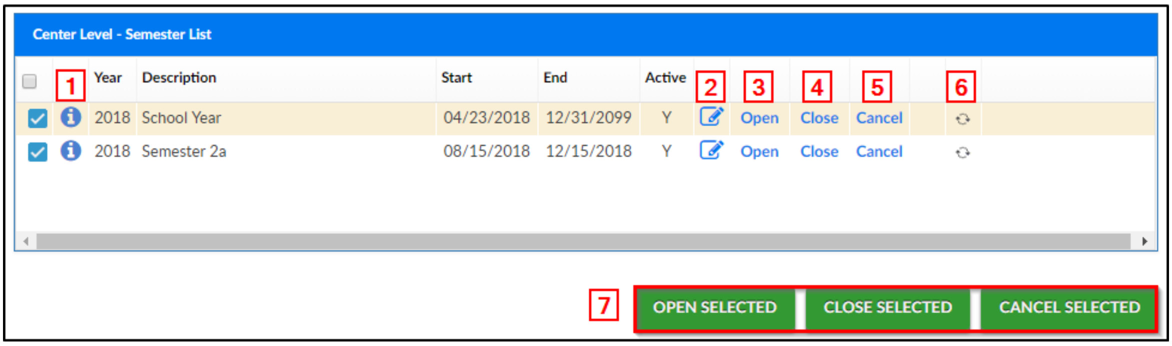
Last Modified on 12/28/2018 11:02 am EST

Semesters are time periods within the center that control room/program dates and times and registration dates and times. By setting up and using semesters, students will have classroom assignments with a start and end date.

- Semesters are typically used in centers where there is a annual registration fee
- Semesters are required for setting up online registration

Navigating Current Semesters

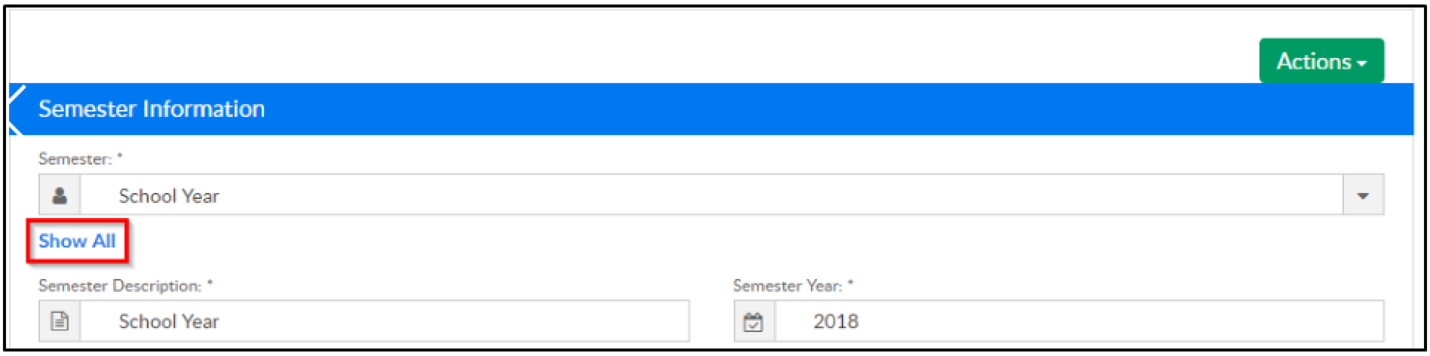
The Center Level – Semester List at the bottom of the screen displays all current and future semesters. In this section, semester summaries can be viewed, semester information can be edited, registration can be opened, etc. Review the full list of options below:



☐		Year	Description	Start	End	Active					
☑	ℹ	2018	School Year	04/23/2018	12/31/2099	Y	✎	Open	Close	Cancel	⟳
☑	ℹ	2018	Semester 2a	08/15/2018	12/15/2018	Y	✎	Open	Close	Cancel	⟳

1. View semester information/summary
2. Edit semester information
3. Open registration for the semester
4. Close registration for the semester
5. Cancel registration for the semester
6. Clone a semester and all room/programs that have been attached
7. Open, Close, or Cancel multiple semesters by using the check mark in the first column

Please Note: If you wish to view a past semester, click the Show All button under the Semester drop-down.



Semester Information

Semester: * School Year

Semester Description: * School Year

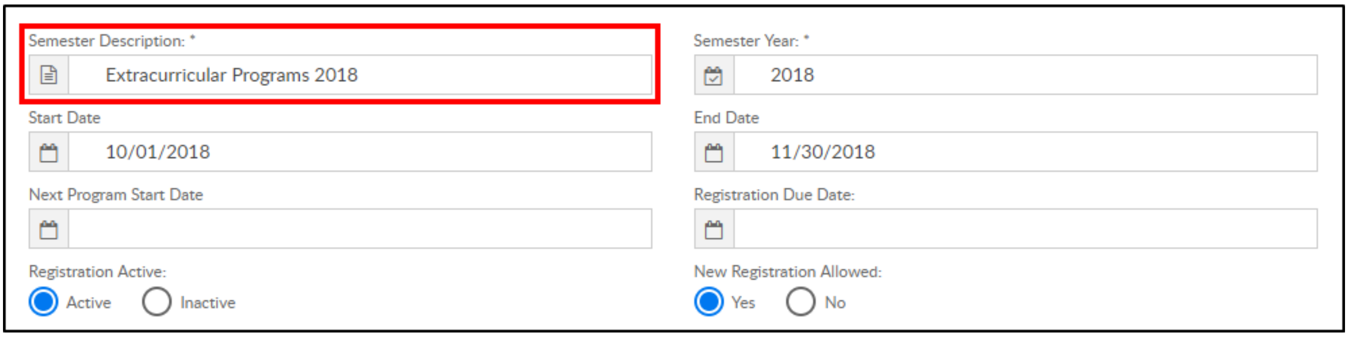
Semester Year: * 2018

Creating a New Semester

There are 4 “Semester Cost At” options to choose from when creating a new semester; Room/Program, Semester Participant, Semester Family, and Semester Family & Room/Program. Semester Cost At determines how students and families will be charged.

Navigate to the Setup menu, then select Semester and follow the steps below to create a new semester. **Please Note**: Not all fields are required, ** indicates required fields.

1. **Semester Description – enter the name of the semester



Semester Description: * Extracurricular Programs 2018

Semester Year: * 2018

Start Date 10/01/2018

End Date 11/30/2018

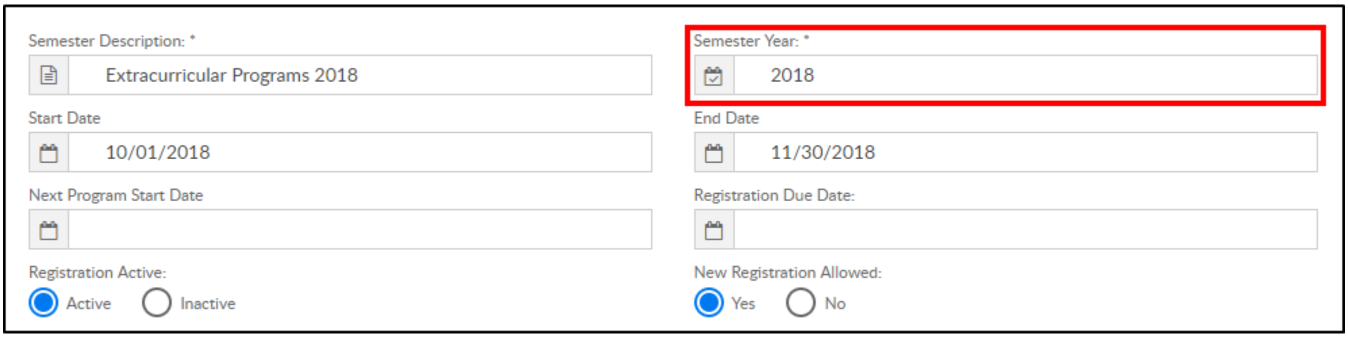
Next Program Start Date

Registration Due Date:

Registration Active: ● Active ○ Inactive

New Registration Allowed: ● Yes ○ No

2. **Semester Year - enter the year the semester is in



Semester Description: * Extracurricular Programs 2018

Semester Year: * 2018

Start Date 10/01/2018

End Date 11/30/2018

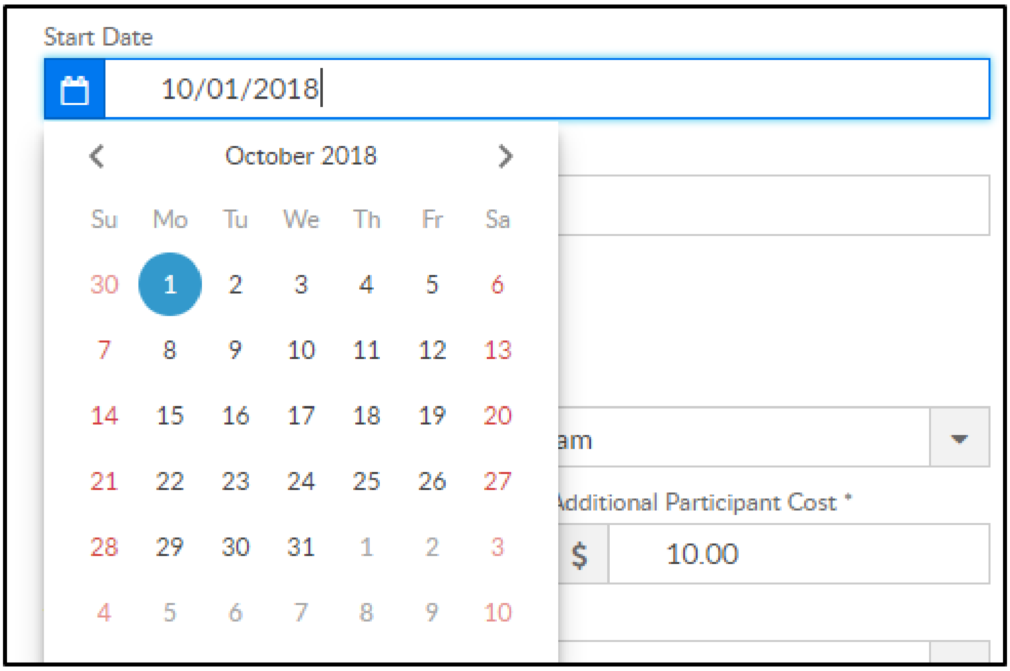
Next Program Start Date

Registration Due Date:

Registration Active: ● Active ○ Inactive

New Registration Allowed: ● Yes ○ No

3. **Start Date – select the first day of the semester from the calendar

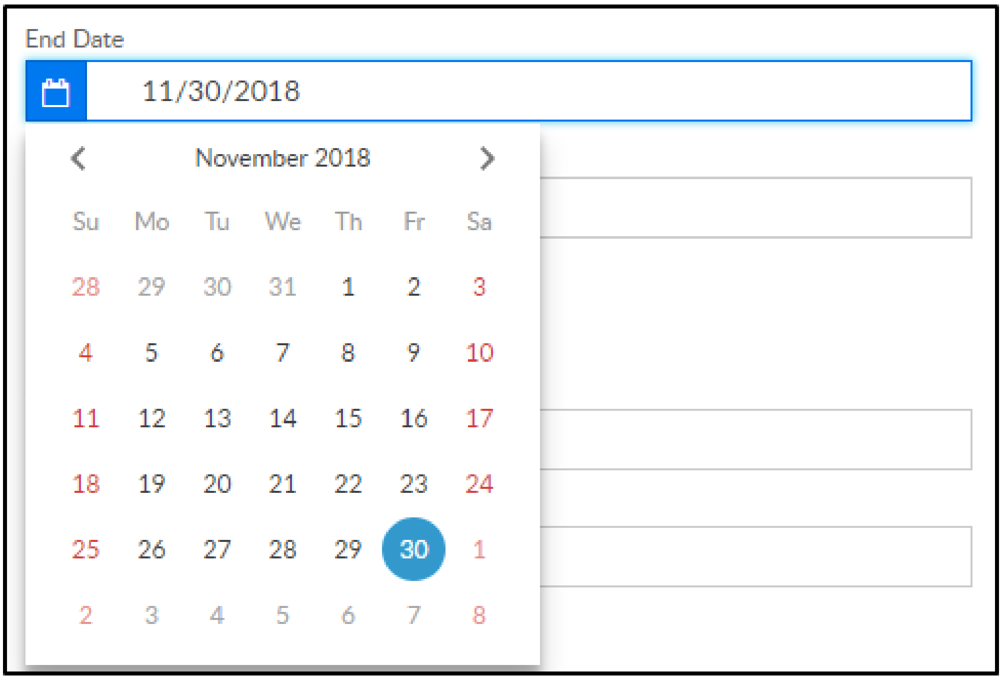


Start Date

10/01/2018

Additional Participant Cost * $ 10.00

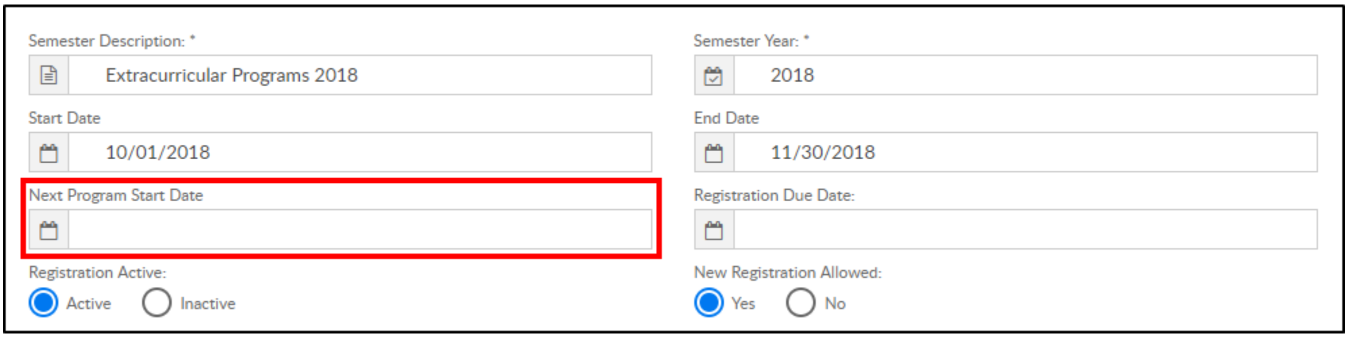
4. **End Date – select the last day of the semester from the calendar



End Date

11/30/2018

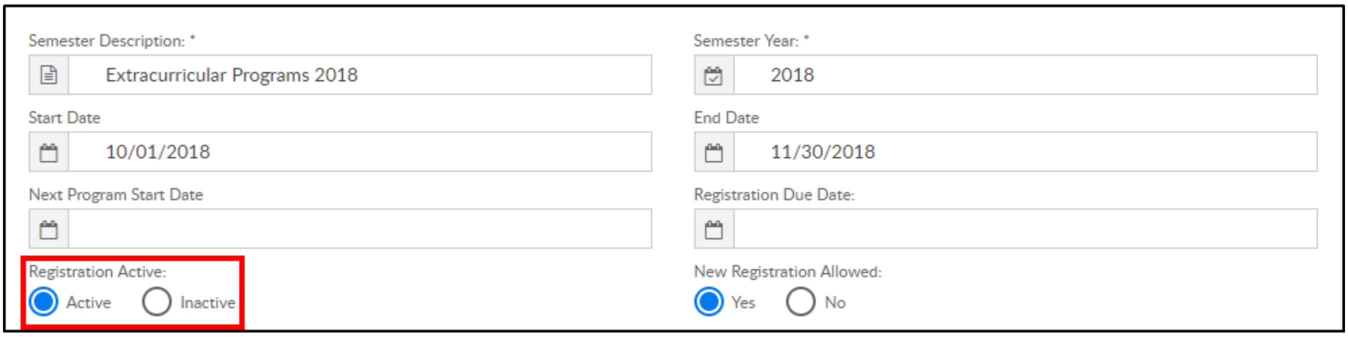
5. Next Program Start Date – if there is a new enrollment date that will be assigned to a student that registers, enter that date in this field. This is used for centers that offer a year-round semester, but have specific enrollment dates for children based on when they register for a classroom within the semester. If there is no date in this field, it will use the registration start date. **Recommended Setting**: In the Room configuration screen, Allow Initial Start Date should be set to No



Semester Description: * Extracurricular Programs 2018
Semester Year: * 2018
Start Date 10/01/2018
End Date 11/30/2018
Next Program Start Date
Registration Due Date:
Registration Active: ● Active ○ Inactive
New Registration Allowed: ● Yes ○ No

  - Event Room type specifics
    - Start date cannot be overridden by admins
    - The Allow Initial Start Date option is hidden for Events
    - Next Program Start Date does not apply to Events
  - Setting this option to Yes, allows parents to select the start date instead of going by the semester dates
  - For Wait List rooms, administrators can override the start date when they approve from the Approval > Wait List screen

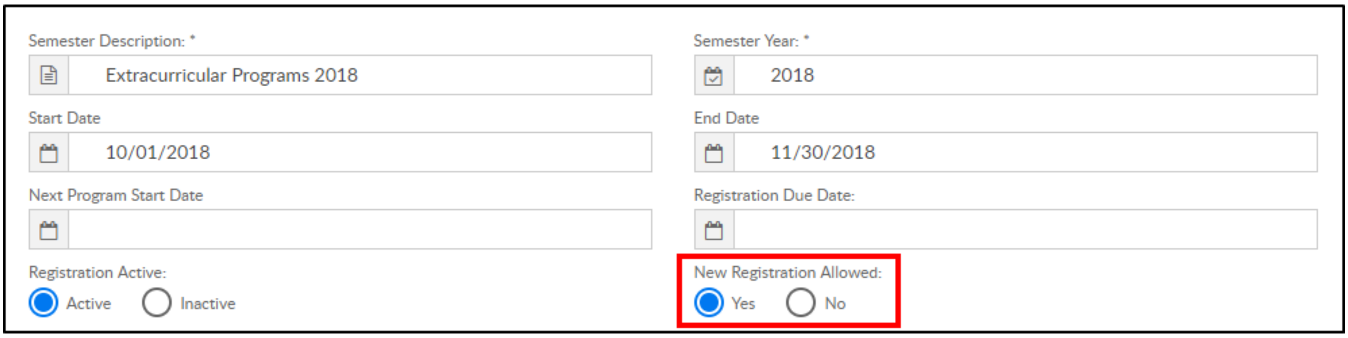
6. Registration Active



Semester Description: * Extracurricular Programs 2018
Semester Year: * 2018
Start Date 10/01/2018
End Date 11/30/2018
Next Program Start Date
Registration Due Date:
Registration Active: ● Active ○ Inactive
New Registration Allowed: ● Yes ○ No

  - Active – if parents should be currently registering for this semester
  - Inactive – parents should not currently be registering for this semester

7. New Registration Allowed

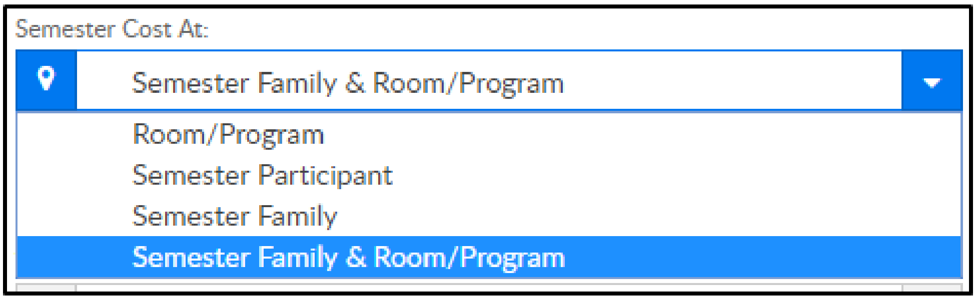


Semester Description: * Extracurricular Programs 2018
Semester Year: * 2018
Start Date 10/01/2018
End Date 11/30/2018
Next Program Start Date
Registration Due Date:
Registration Active: ● Active ○ Inactive
New Registration Allowed: ● Yes ○ No

  - Yes – current and new families can register
  - No – only existing families with a Connect Portal account can register

8. **Semester Cost At – choose the option below to determine how a student/family

should be charged. Click the link to be directed to the correct article for more information and setup instructions



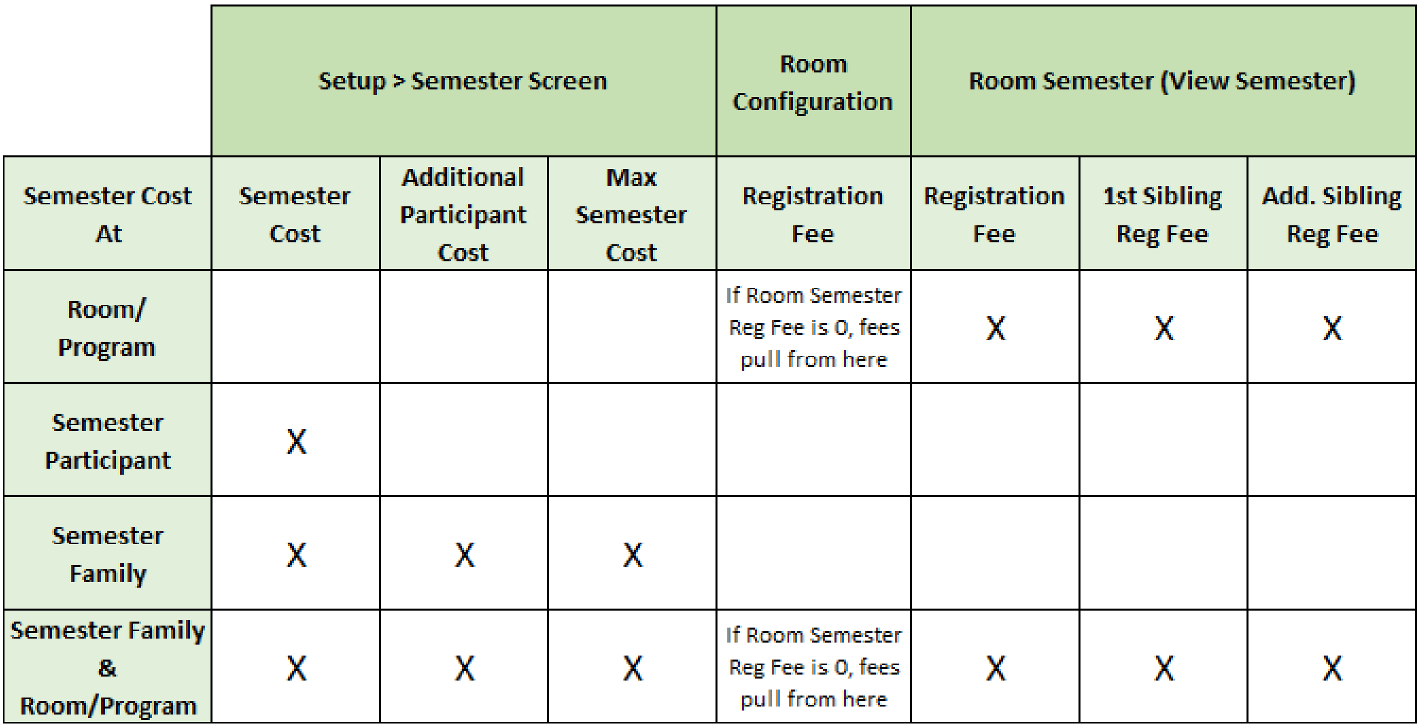
Semester Cost At:

Semester Family & Room/Program

- Room/Program - When choosing Room/Program, the system will first look at registration fees setup in the Room Semester screen. If there are no fees at the Room Semester level, it will then pull the registration fee from the Room Configuration screen
- Semester Participant - Using Semester Participant, the fee must be setup on the Setup > Semester screen under Semester Cost
- Semester Family - Semester Family fees are pulled from the Semester Cost field on the Setup > Semester screen. This option also allows additional participant/sibling costs to be setup
- Semester Family & Room/Program - This option combines the two semester types into one. Fees are pulled from the Semester Cost field on the Setup > Semester screen, as well as the room level fees. Room level fees from the Room Semester screen will be pulled first. If there are no fees at the Room Semester level, it will then pull fees from the Room Configuration screen

Fee Chart

Review chart below to see where fees are pulling from for each Semester Cost At option listed above:



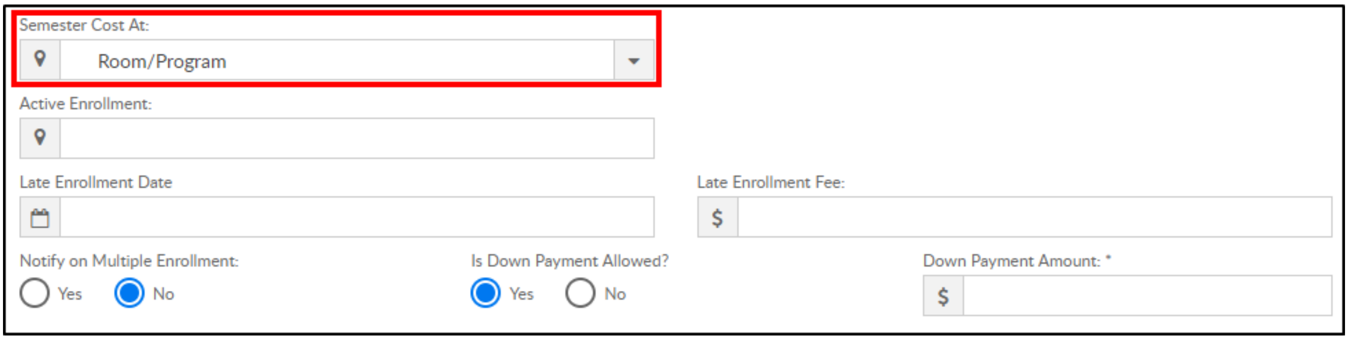
	Setup > Semester Screen			Room Configuration	Room Semester (View Semester)		
Semester Cost At	**Semester Cost**	**Additional Participant Cost**	**Max Semester Cost**	**Registration Fee**	**Registration Fee**	**1st Sibling Reg Fee**	**Add. Sibling Reg Fee**
Room/ Program				If Room Semester Reg Fee is 0, fees pull from here	X	X	X
Semester Participant	X						
Semester Family	X	X	X				
Semester Family & Room/Program	X	X	X	If Room Semester Reg Fee is 0, fees pull from here	X	X	X

Setup > Semester, Room/Program

Last Modified on 12/28/2018 11:08 am EST

There are 4 “Semester Cost At” options to choose from when creating a new semester; Room/Program, Semester Participant, Semester Family, and Semester Family & Room/Program. Once steps 1-8 are completed from the Setup > Semester article, follow the steps below to set up a Room/Program semester:

1. Semester Cost At – Room/Program. **Please Note**: fees for this semester must be set up in the View Semester or Room configuration screens. When using Room/Program, the registration fees will pull from the Room Semester (View Semester) screen first. If there are no fees setup in the room semester screen, fees will pull from the Room Configuration screen. Click here for registration fee examples or see chart at the bottom of the page



Semester Cost At: Room/Program

Active Enrollment:

Late Enrollment Date

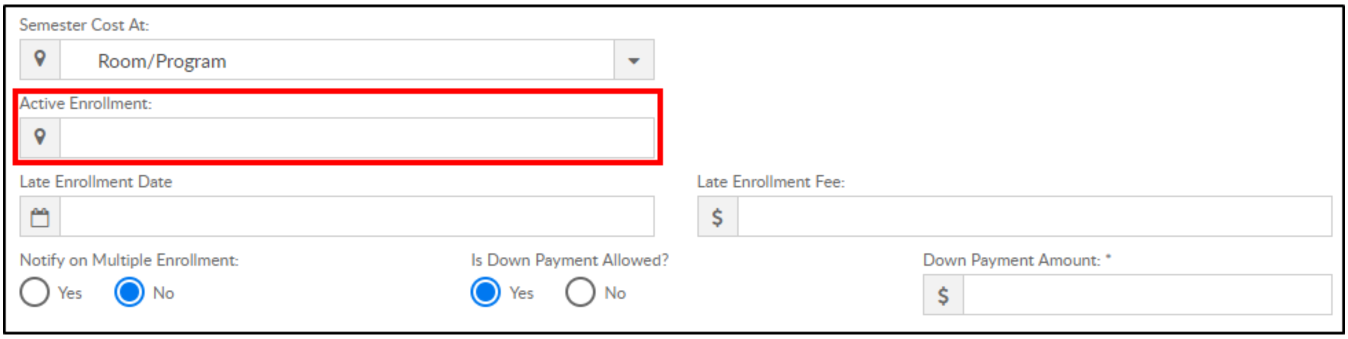
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $

2. Active Enrollment – leave blank when creating a new semester. During active enrollment, this field will display number of students currently enrolled



Semester Cost At: Room/Program

Active Enrollment:

Late Enrollment Date

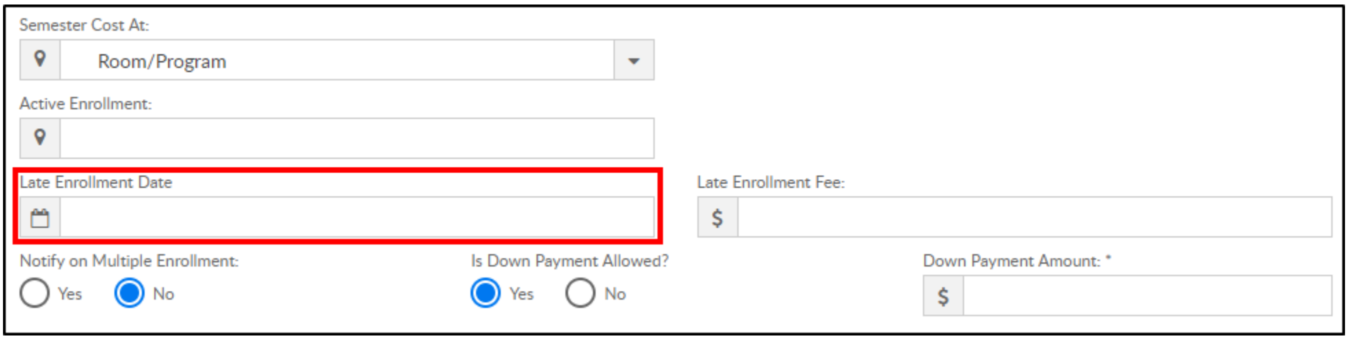
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $

3. Late Enrollment Date – if a family will be charged a late registration fee on top of the regular registration fee, enter the date the late enrollment will begin


Semester Cost At: Room/Program

Active Enrollment:

Late Enrollment Date

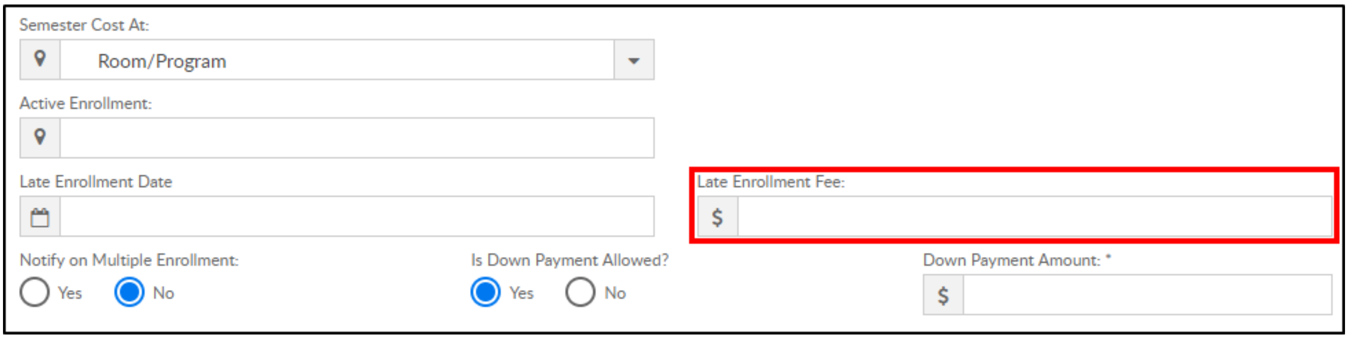
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $

4. Late Enrollment Fee – enter the late registration fee


Semester Cost At: Room/Program

Active Enrollment:

Late Enrollment Date

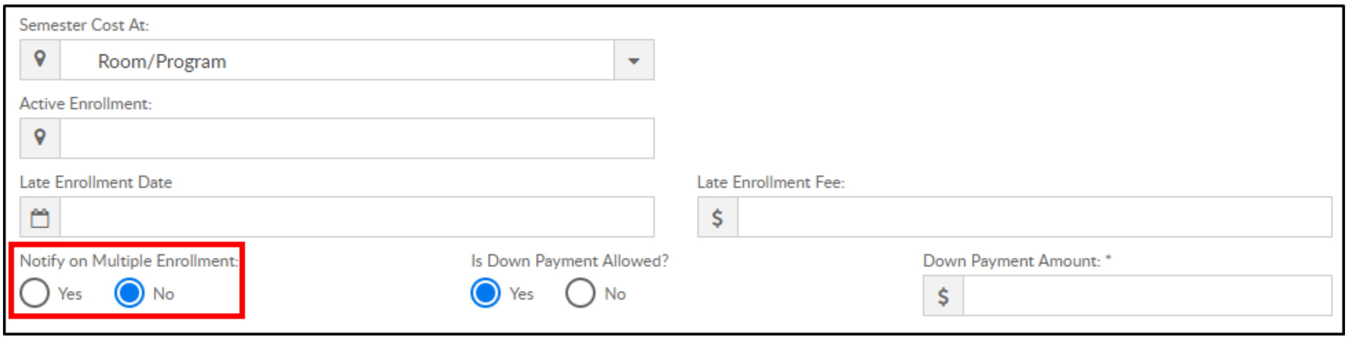
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $

5. Notify on Multiple Enrollment – if an existing student registers for multiple programs within the same semester via the Connect Portal, the parent will receive a warning message on that portal registration session


Semester Cost At: Room/Program

Active Enrollment:

Late Enrollment Date

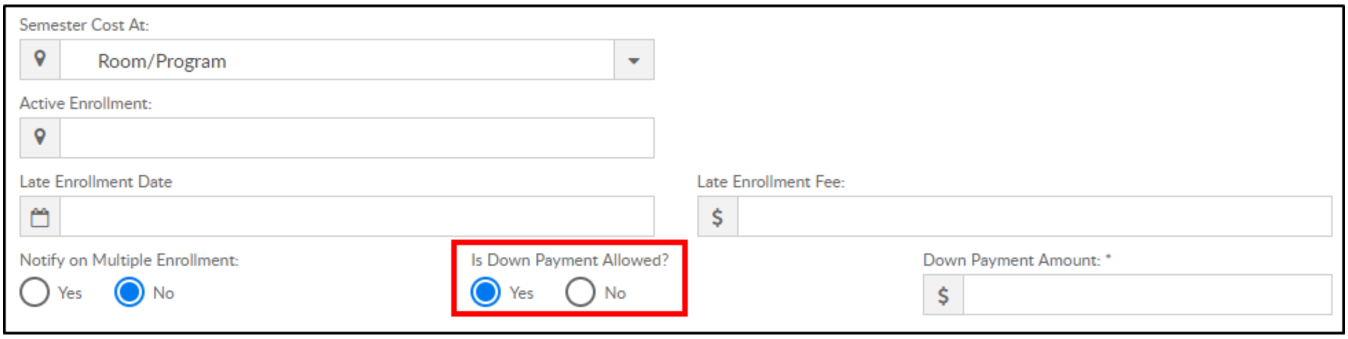
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $

6. Is Down Payment Allowed ?


Semester Cost At: Room/Program

Active Enrollment:

Late Enrollment Date

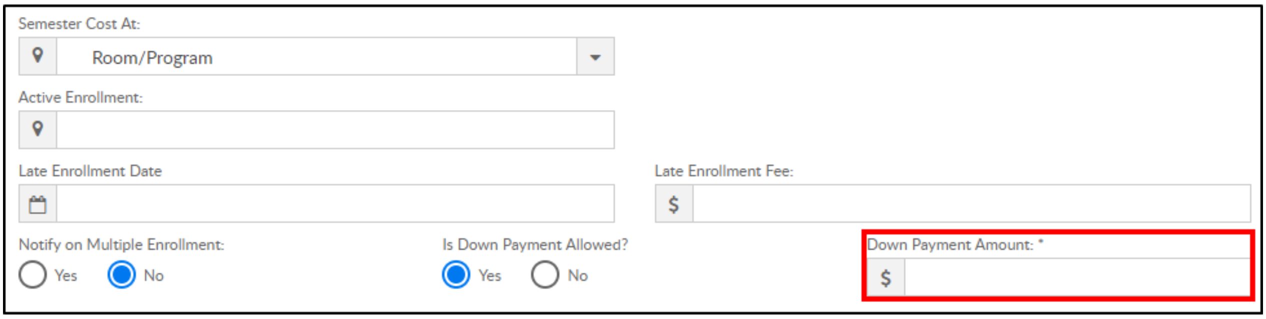
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $

   - Yes – a down payment must be made to register. Down Payment Amount is required at this point



Semester Cost At: Room/Program

Active Enrollment:

Late Enrollment Date

Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $

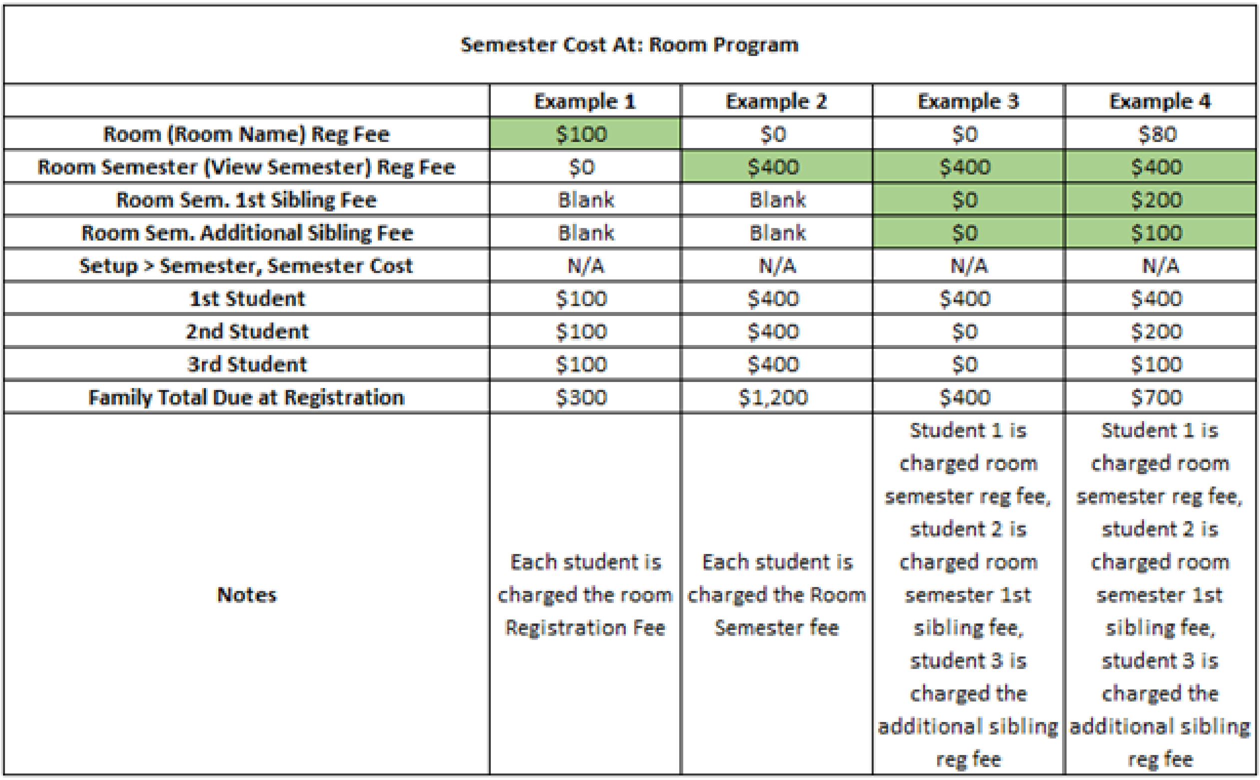
- No – a down payment is not allowed

7. Click

- Save - save the semester details
- Open Enrollment - save the semester details and open the semester and rooms/programs for registration
- Close Enrollment - close the semester and room/programs associated. Semester becomes Inactive
- Cancel Enrollment - cancelled semesters will cancel the room, but the semester still appears as Active

Fee Examples

The chart below describes how families are charged based on where the fees are entered:



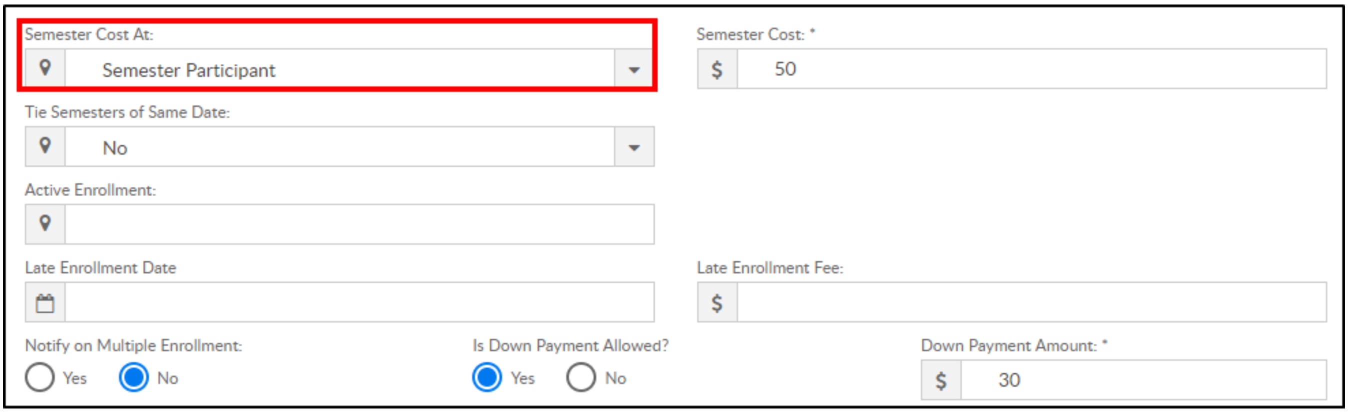
Semester Cost At: Room Program				
	Example 1	Example 2	Example 3	Example 4
Room (Room Name) Reg Fee	$100	$0	$0	$80
Room Semester (View Semester) Reg Fee	$0	$400	$400	$400
Room Sem. 1st Sibling Fee	Blank	Blank	$0	$200
Room Sem. Additional Sibling Fee	Blank	Blank	$0	$100
Setup > Semester, Semester Cost	N/A	N/A	N/A	N/A
1st Student	$100	$400	$400	$400
2nd Student	$100	$400	$0	$200
3rd Student	$100	$400	$0	$100
Family Total Due at Registration	$300	$1,200	$400	$700
Notes	Each student is charged the room Registration Fee	Each student is charged the Room Semester fee	Student 1 is charged room semester reg fee, student 2 is charged room semester 1st sibling fee, student 3 is charged the additional sibling reg fee	Student 1 is charged room semester reg fee, student 2 is charged room semester 1st sibling fee, student 3 is charged the additional sibling reg fee

Setup > Semester, Semester Participant

Last Modified on 12/28/2018 11:05 am EST

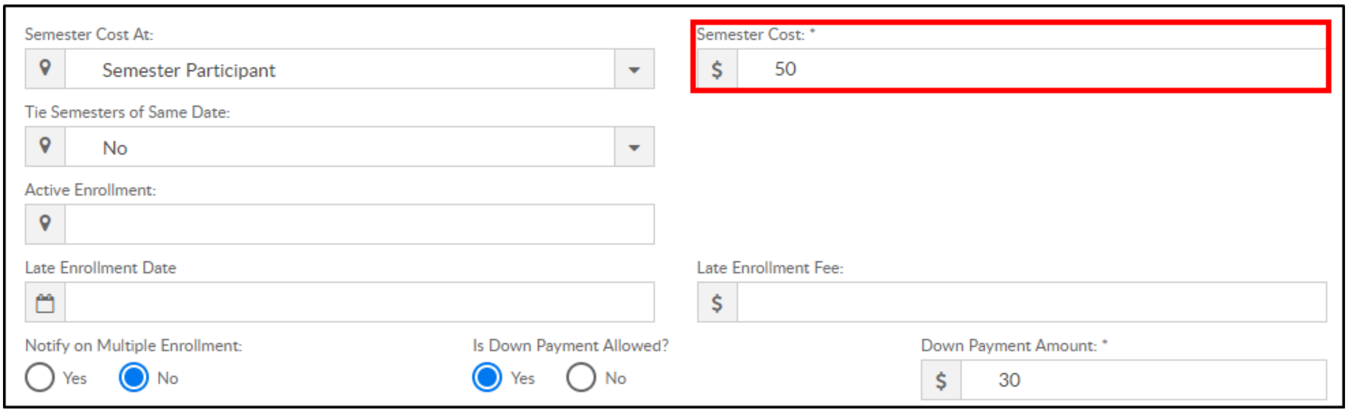
There are 4 "Semester Cost At" options to choose from when creating a new semester; Room/Program, Semester Participant, Semester Family, and Semester Family & Room/Program. Once steps 1-8 are completed from the Setup > Semester article, follow the steps below to set up a Semester Participant semester:

1. Semester Cost At – Semester Participant



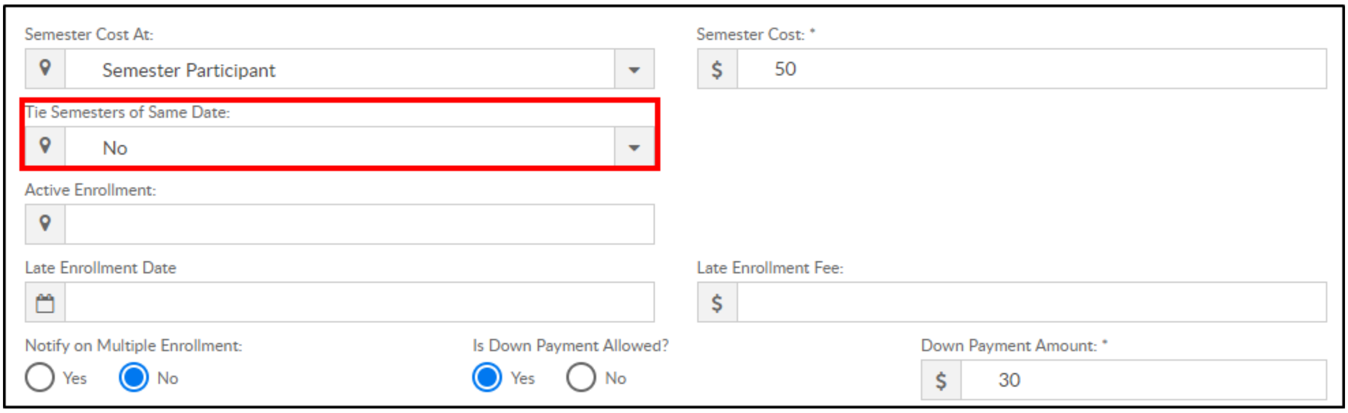
Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

2. Semester Cost – enter the semester fee to be charged per student. Please Note: Semester Participant only pulls fees from this field



Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

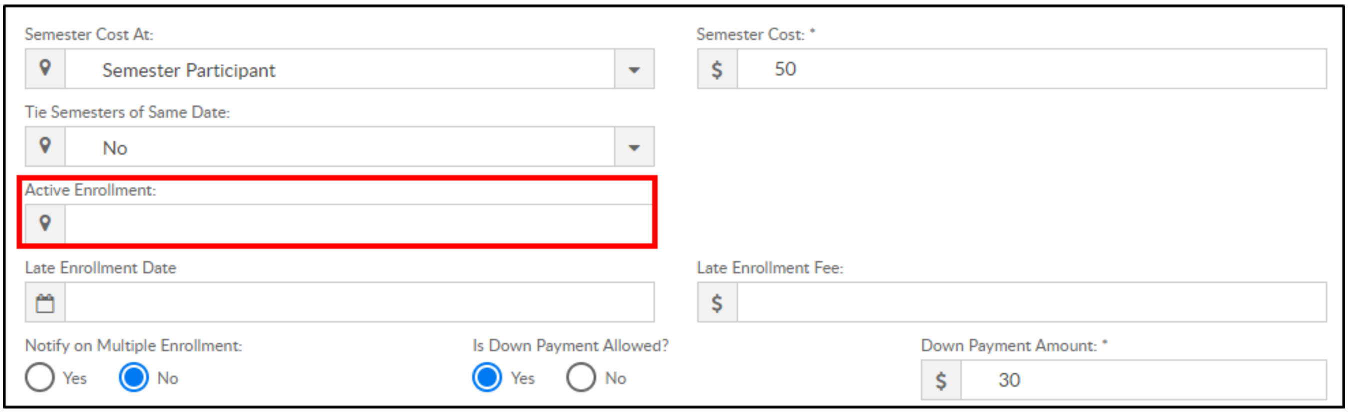
3. Tie Semesters of Same Date



Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

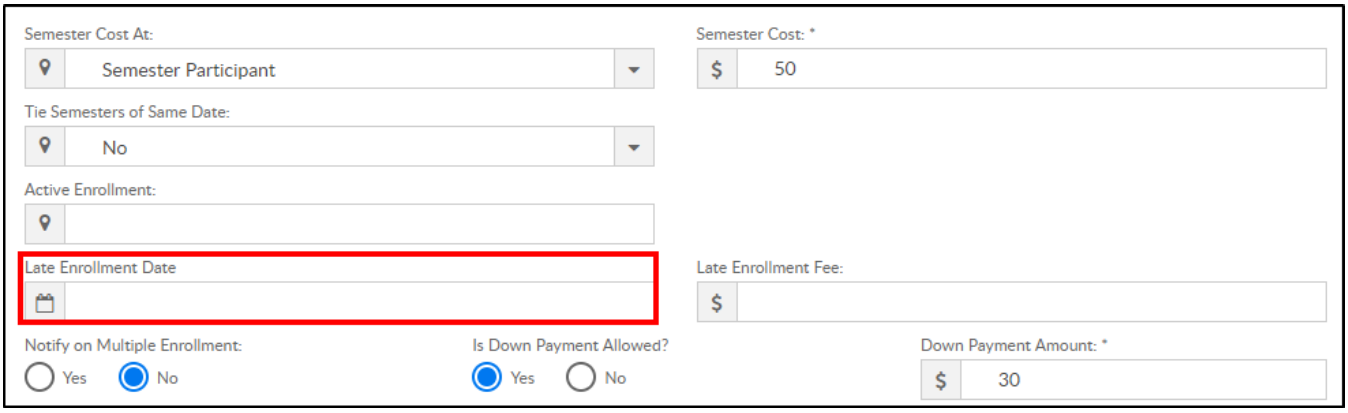
  - Yes – all semesters with the same start and end dates should be tied together. Tied semesters will only charge the student one semester cost. **Recommendation**: all tied semesters should have the same Semester Cost and Semester Cost At setup
  - No – do not tie semesters of the same dates together

4. Active Enrollment – leave blank when creating a new semester. During active enrollment, this field will display number of students currently enrolled



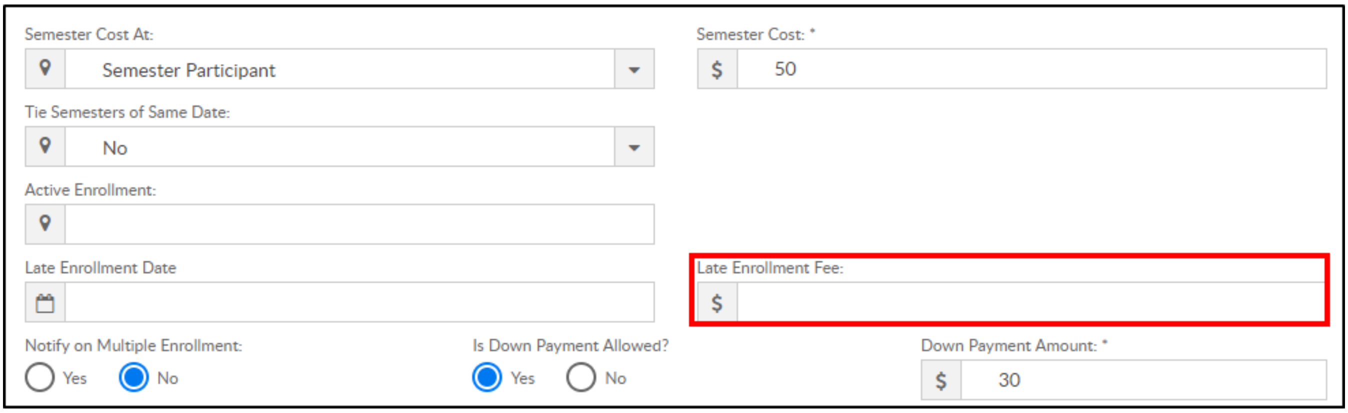
Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

5. Late Enrollment Date – if a family will be charged a late registration fee on top of the regular registration fee, enter the date the late enrollment will begin



Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

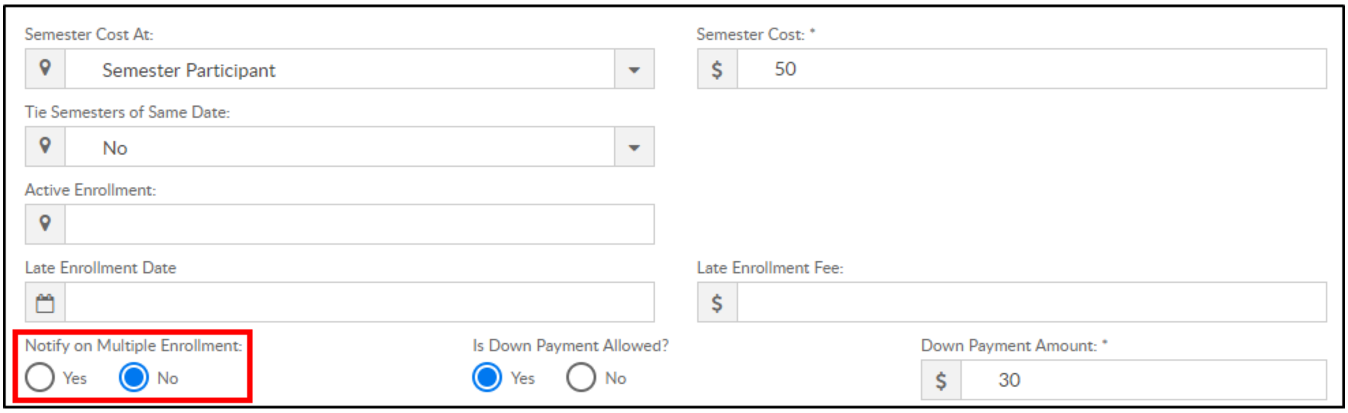
6. Late Enrollment Fee – enter the late registration fee



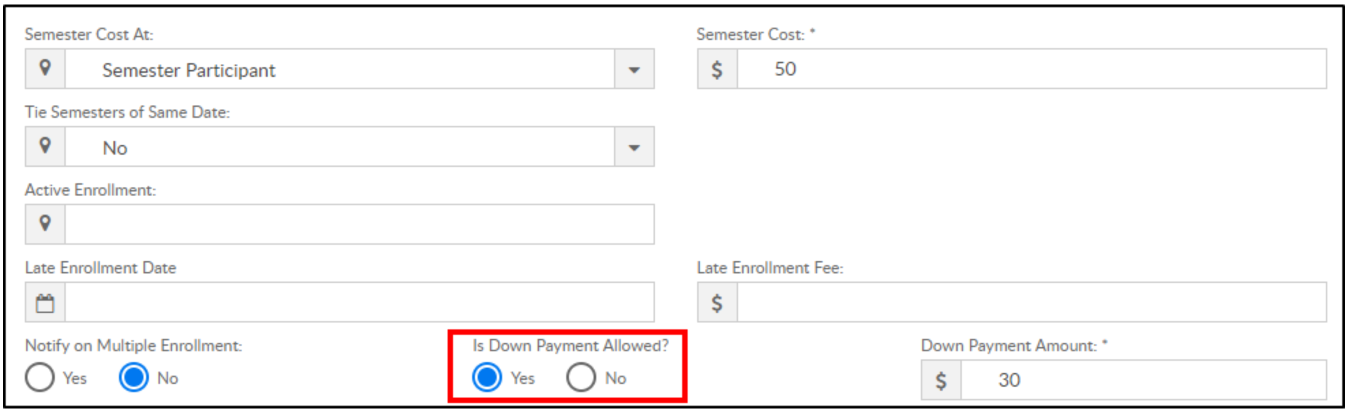
Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

7. Notify on Multiple Enrollment – if an existing student registers via the Connect

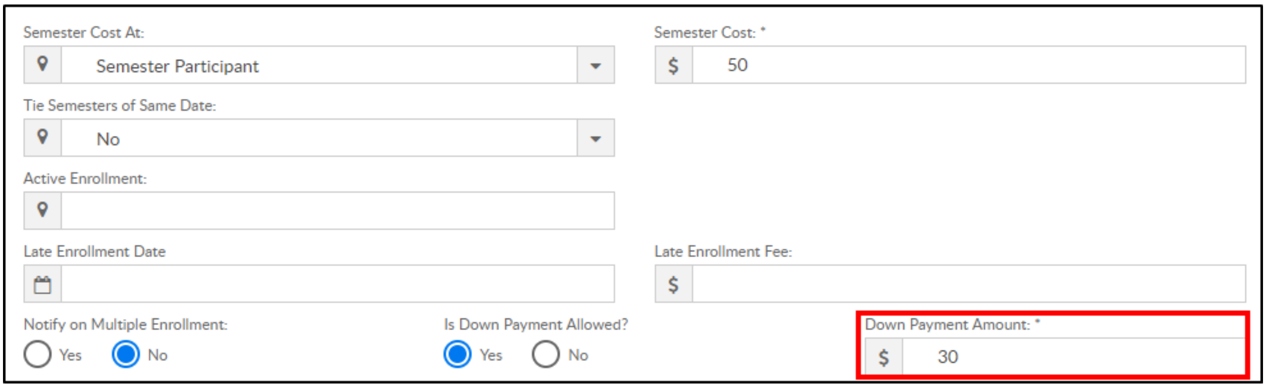
Portal for multiple programs within the same semester, the parent will receive a warning message on that portal registration session


Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

8. Is Down Payment Allowed ?


Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

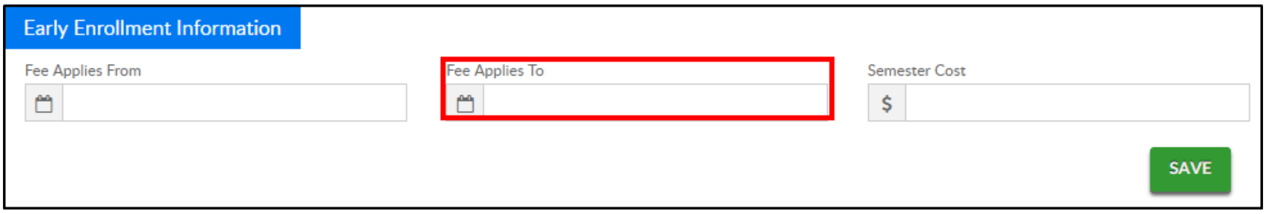
- Yes – a down payment must be made to register. If yes, Down Payment Amount is required


Semester Cost At: Semester Participant
Semester Cost: * $ 50
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 30

- No – a down payment is not allowed/required

9. Early Enrollment Information - if families can register during an early enrollment period, complete the options below
    - Fee Applies From – enter the start date for early enrollment

- Fee Applies To – enter the end date of early enrollment



- Semester Cost – enter the semester cost for a student during early enrollment

10. Click

- Save - save the semester details
- Open Enrollment - save the semester details and open the semester and rooms/programs for registration
- Close Enrollment - close the semester and room/programs associated. Semester becomes Inactive
- Cancel Enrollment - cancelled semesters will cancel the room, but the semester still appears as Active

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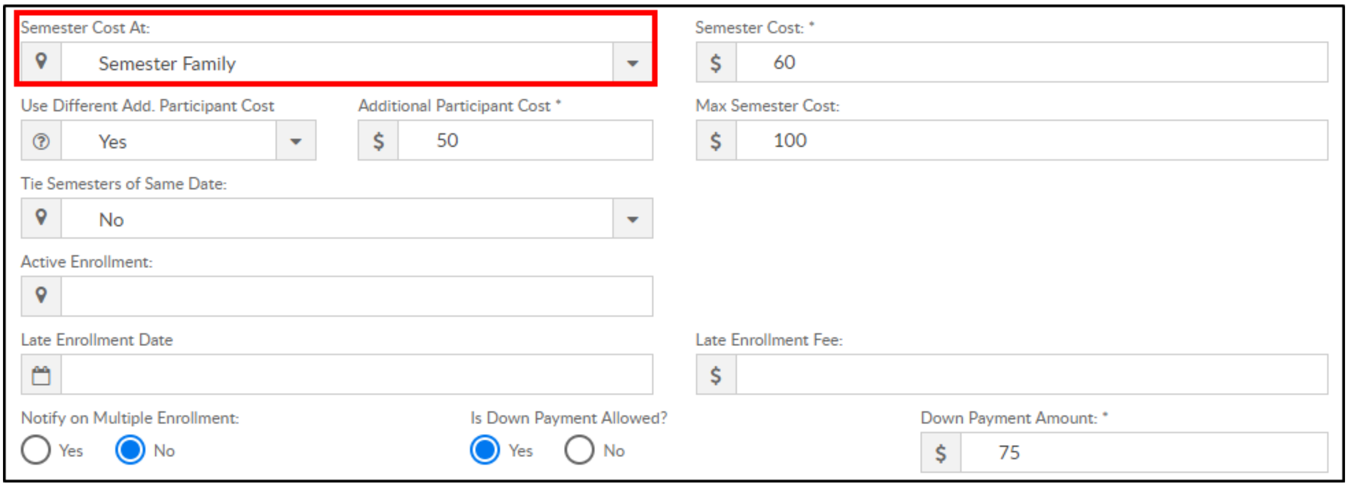
Setup > Semester, Semester Family

Last Modified on 12/28/2018 11:07 am EST

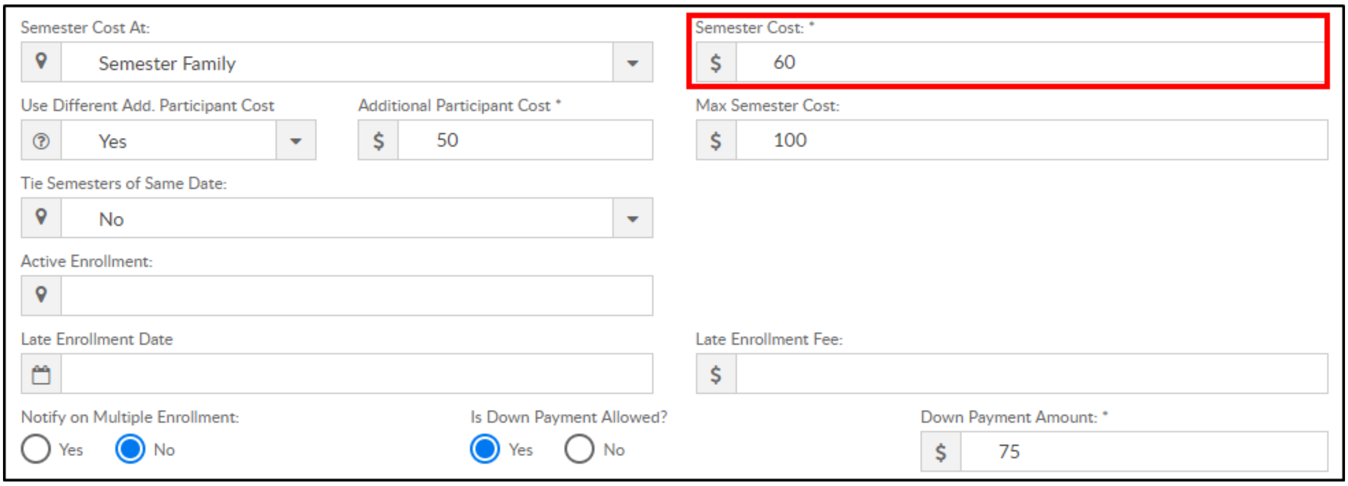
There are 4 “Semester Cost At” options to choose from when creating a new semester; Room/Program, Semester Participant, Semester Family, and Semester Family & Room/Program. Once steps 1-8 are completed from the Setup > Semester article, follow the steps below to set up a Semester Family semester:

1. Semester Cost At – Semester Family. For Semester Family fee examples, see the bottom of the page



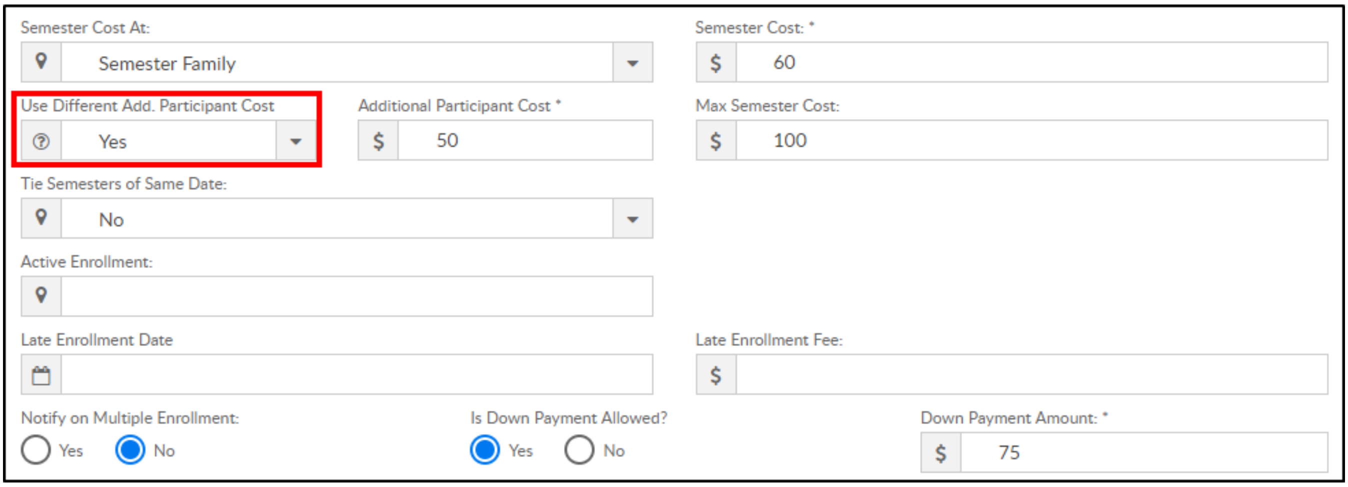
Semester Cost At: Semester Family
Semester Cost: * $ 60
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 50
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

2. Semester Cost – enter the semester fee to be charged per student (unless Use Different Add. Participant Cost is setup)



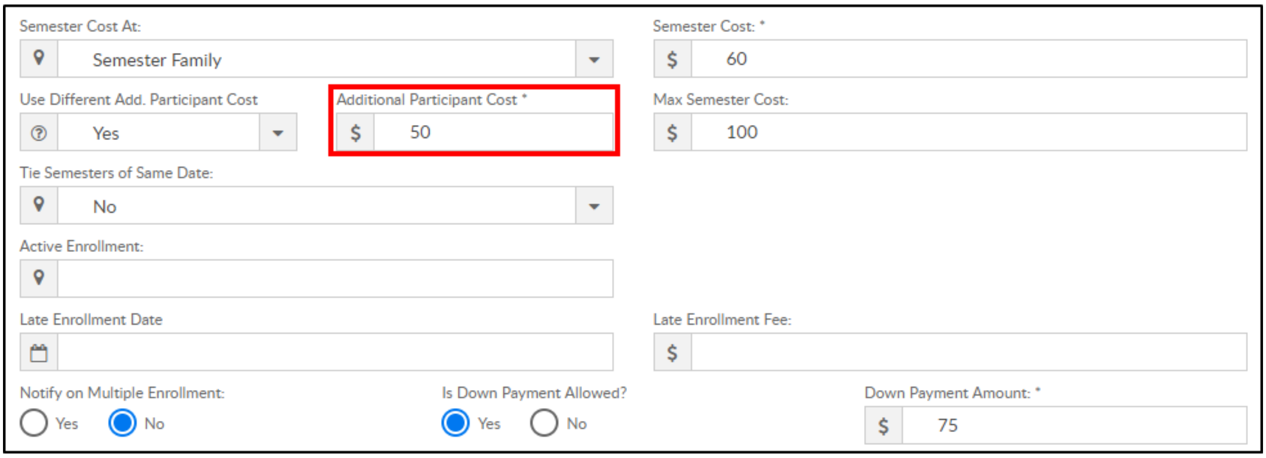
Semester Cost At: Semester Family
Semester Cost: * $ 60
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 50
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

3. Use Different Add. Participant Cost – this allows a different fee to be setup for additional students after the first student registers



Semester Cost At: Semester Family
Semester Cost: * $ 60
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 50
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

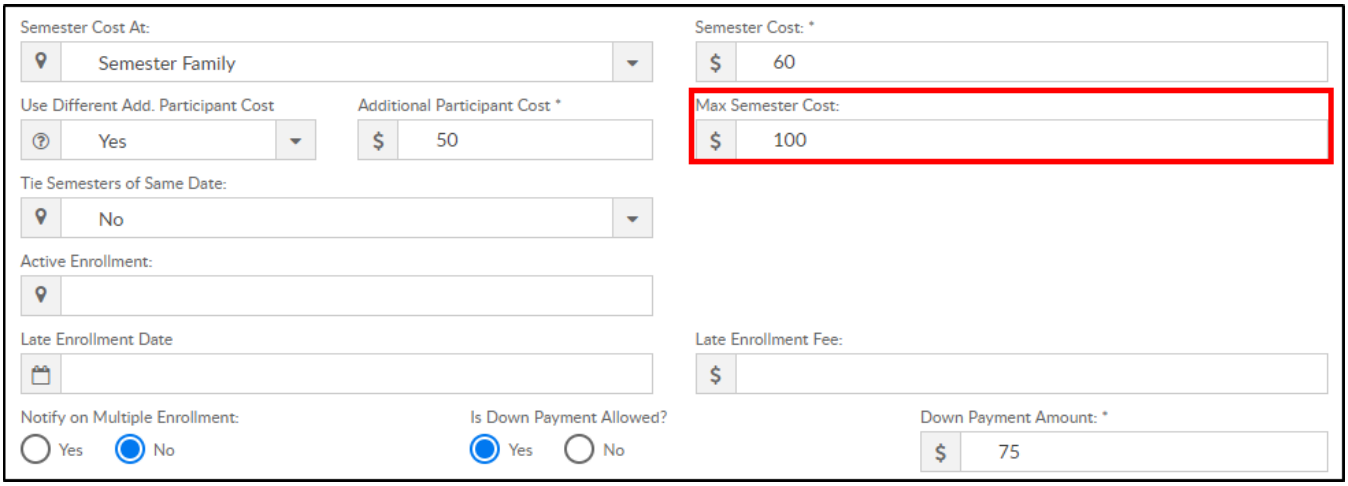
   - Yes – setup a different fee for additional students. Please Note: Additional Participant Cost is required. This fee will be charged for additional siblings. If the fee is zero, additional siblings will not be charged, only the initial student will be charged the Semester Cost fee



Semester Cost At: Semester Family
Semester Cost: * $ 60
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 50
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

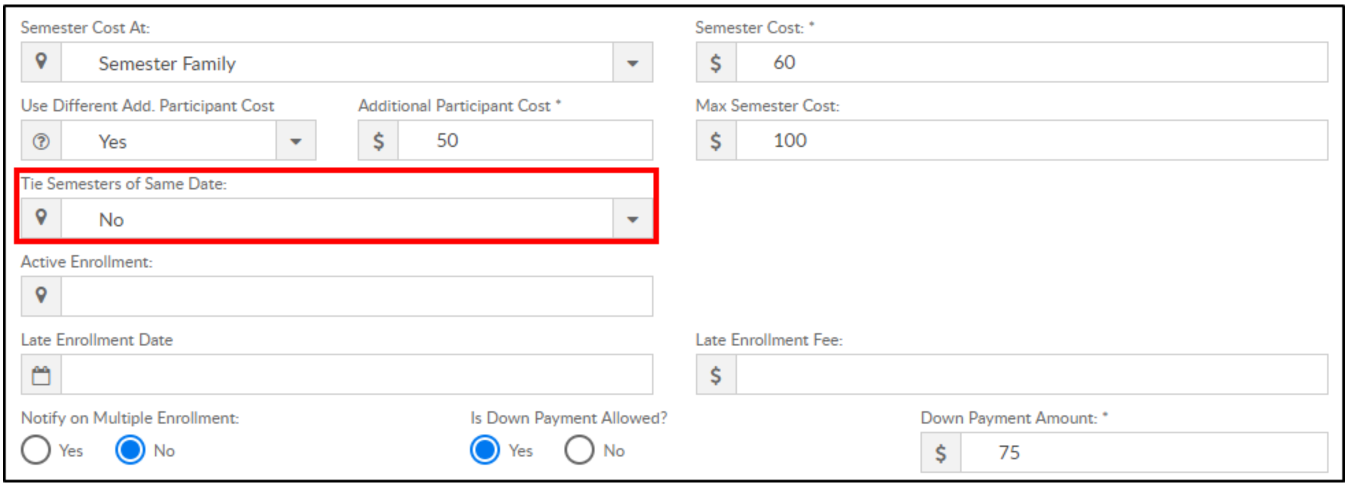
   - No – do not setup a fee for additional students. Each student will be charged the Semester Cost fee

4. Max Semester Cost – maximum fee charged to a family for this semester



Semester Cost At: Semester Family
Semester Cost: * $ 60
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 50
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

5. Tie Semesters of Same Date



Semester Cost At: Semester Family

Semester Cost: * $ 60

Use Different Add. Participant Cost: Yes

Additional Participant Cost * $ 50

Max Semester Cost: $ 100

Tie Semesters of Same Date: No

Active Enrollment:

Late Enrollment Date

Late Enrollment Fee: $

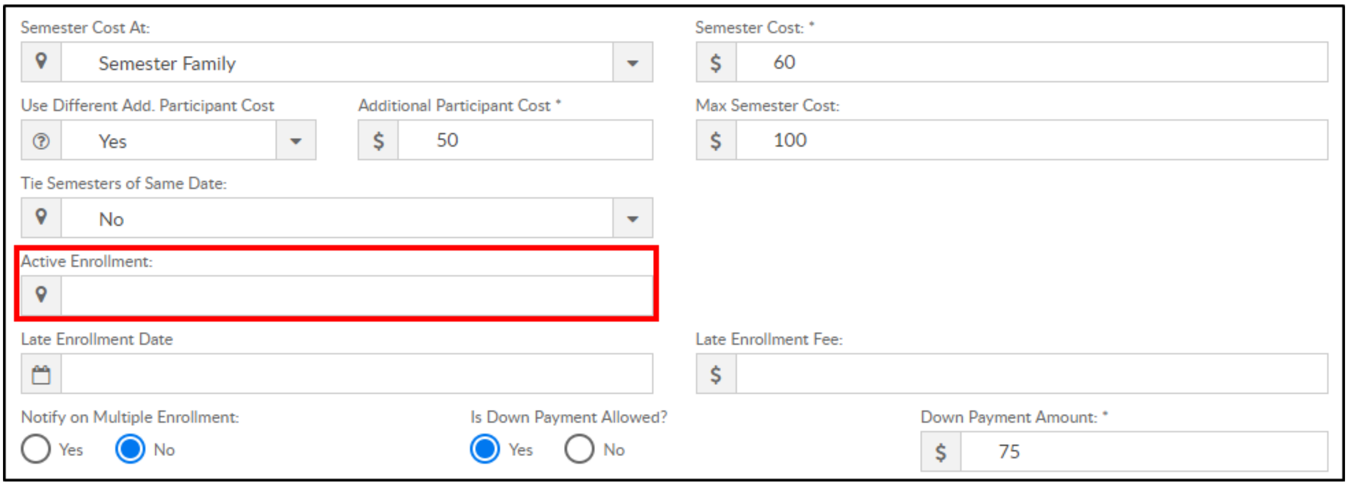
Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $ 75

  - Yes – all semesters with the same start and end dates should be tied together. Tied semesters will only charge the student one semester cost. Recommended setting: all tied semesters should have the same Semester Cost and Semester Cost At setup
  - No – do not tie semesters of the same dates together

6. Active Enrollment – leave blank when creating a new semester. During active enrollment, this field will display number of students currently enrolled



Semester Cost At: Semester Family

Semester Cost: * $ 60

Use Different Add. Participant Cost: Yes

Additional Participant Cost * $ 50

Max Semester Cost: $ 100

Tie Semesters of Same Date: No

Active Enrollment:

Late Enrollment Date

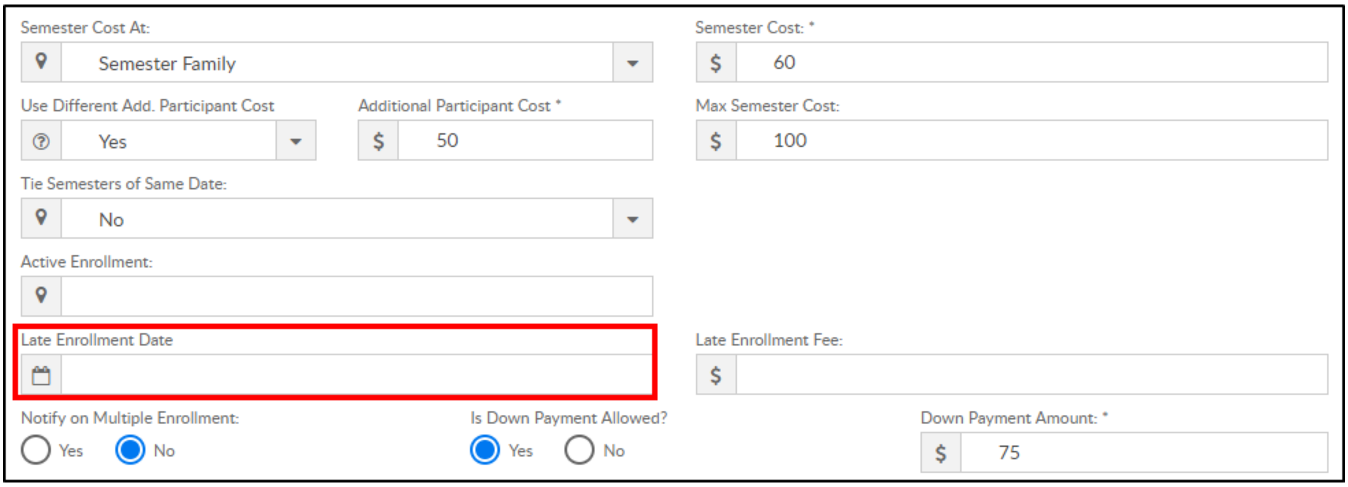
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $ 75

7. Late Enrollment Date – if a family will be charged a late registration fee on top of the regular registration fee, enter the date the late enrollment will begin



Semester Cost At: Semester Family

Semester Cost: * $ 60

Use Different Add. Participant Cost: Yes

Additional Participant Cost * $ 50

Max Semester Cost: $ 100

Tie Semesters of Same Date: No

Active Enrollment:

Late Enrollment Date

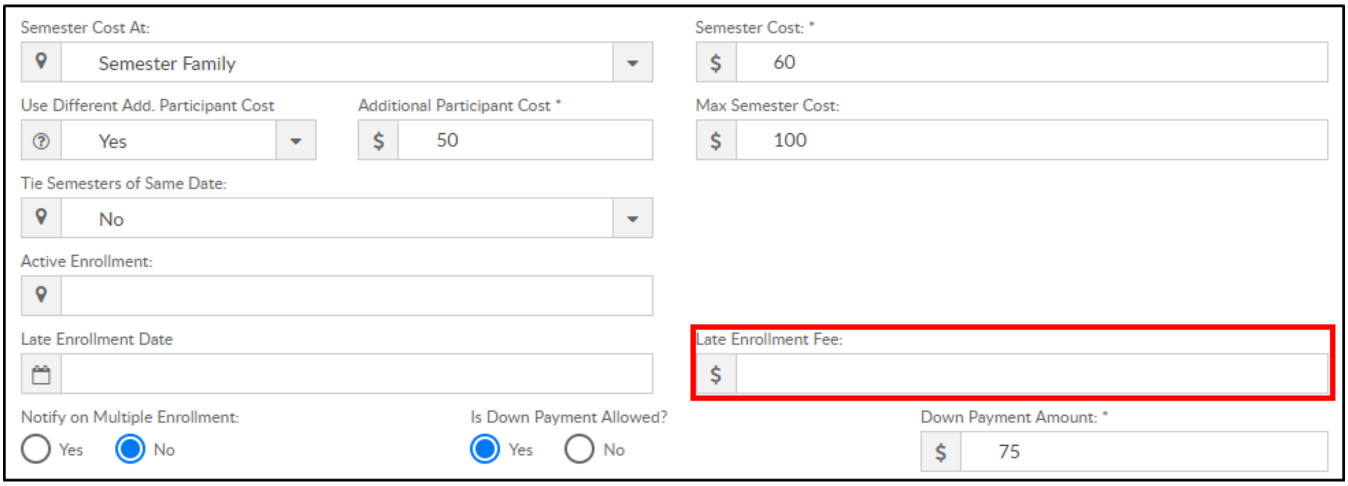
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $ 75

8. Late Enrollment Fee – enter the late registration fee



Semester Cost At: Semester Family

Semester Cost: * $ 60

Use Different Add. Participant Cost: Yes

Additional Participant Cost * $ 50

Max Semester Cost: $ 100

Tie Semesters of Same Date: No

Active Enrollment:

Late Enrollment Date

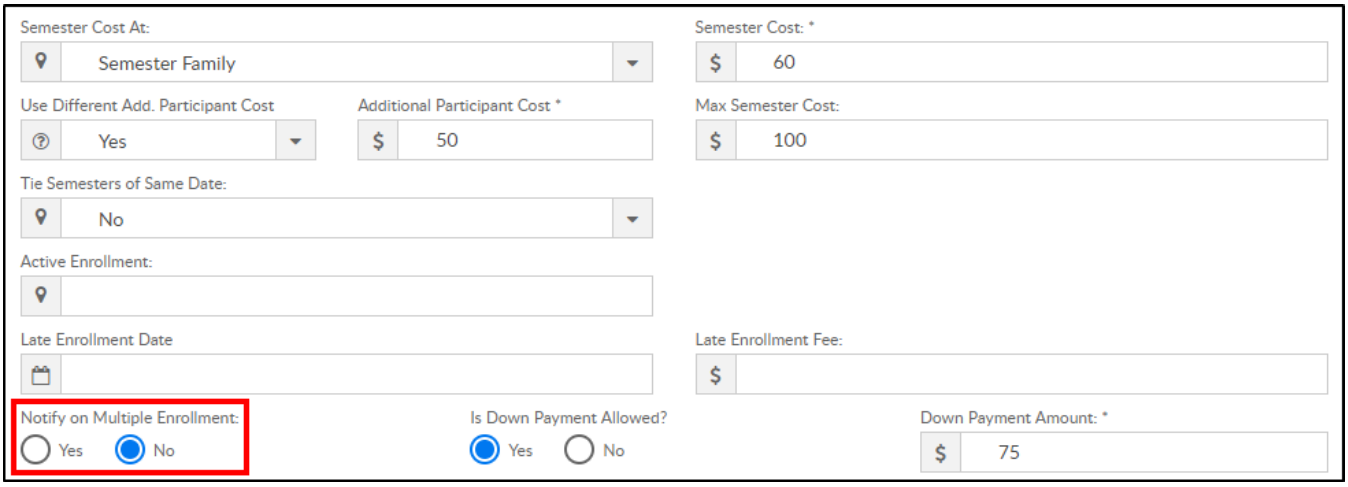
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $ 75

9. Notify on Multiple Enrollment – if an existing student registers for multiple programs within the same semester via the Connect Portal, the parent will receive a warning message on that portal registration session



Semester Cost At: Semester Family

Semester Cost: * $ 60

Use Different Add. Participant Cost: Yes

Additional Participant Cost * $ 50

Max Semester Cost: $ 100

Tie Semesters of Same Date: No

Active Enrollment:

Late Enrollment Date

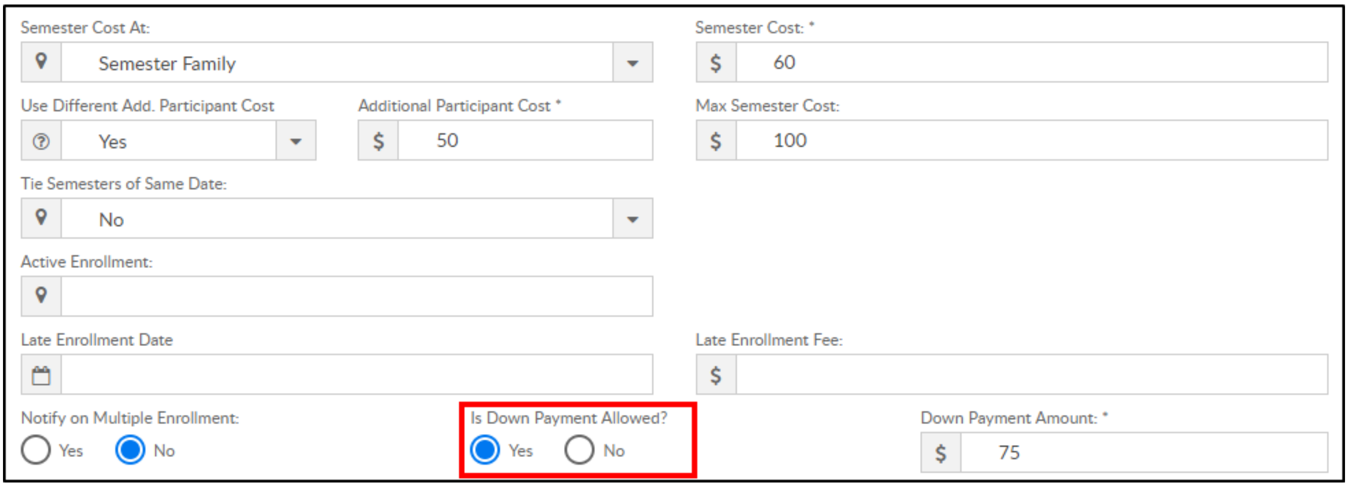
Late Enrollment Fee: $

Notify on Multiple Enrollment: ○ Yes ● No

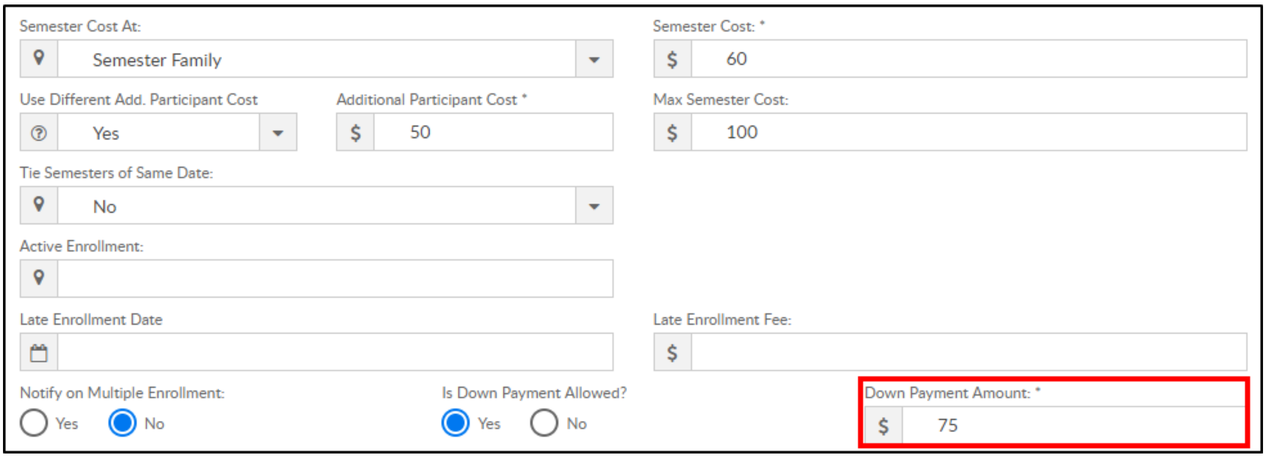
Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $ 75

10. Is Down Payment Allowed ?

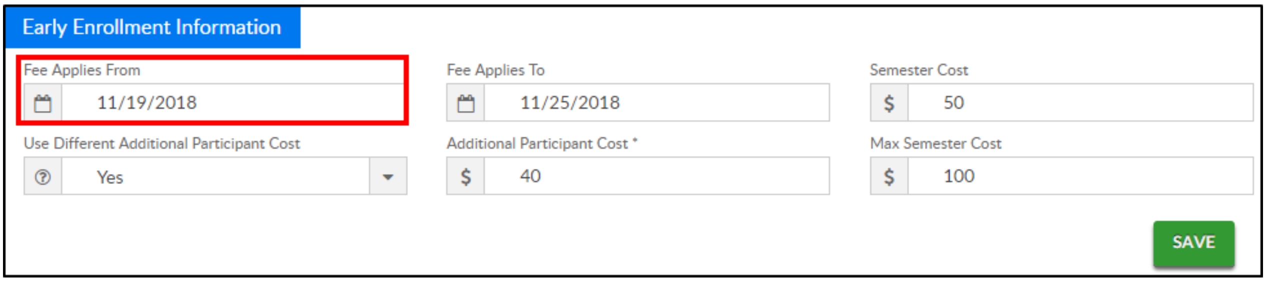

Semester Cost At: Semester Family
Semester Cost: * $ 60
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 50
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

- Yes – a down payment must be made to register. The Down Payment Amount is required at this point

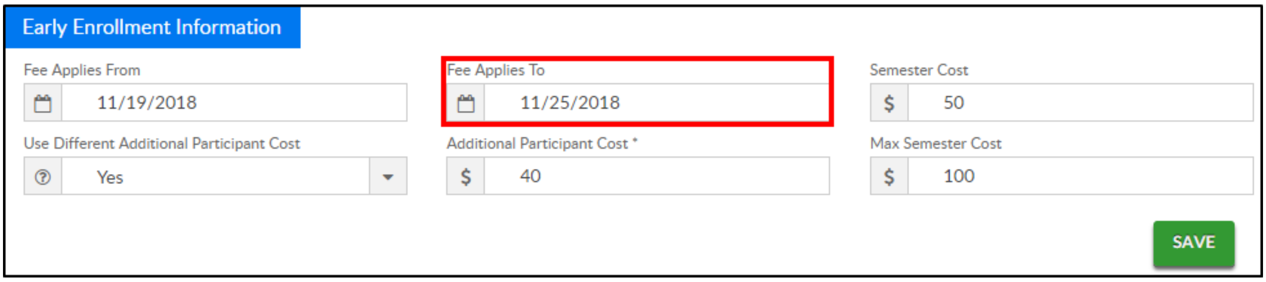

Semester Cost At: Semester Family
Semester Cost: * $ 60
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 50
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

- No – a down payment is not allowed

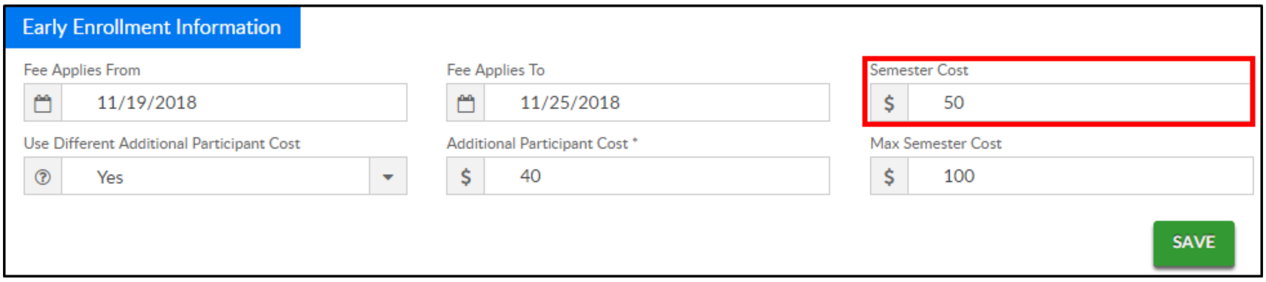
11. Early Enrollment Information - if families can register during an early enrollment period, complete the options below
    - Fee Applies From – enter the start date for early enrollment


Early Enrollment Information
Fee Applies From: 11/19/2018
Fee Applies To: 11/25/2018
Semester Cost: $ 50
Use Different Additional Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100

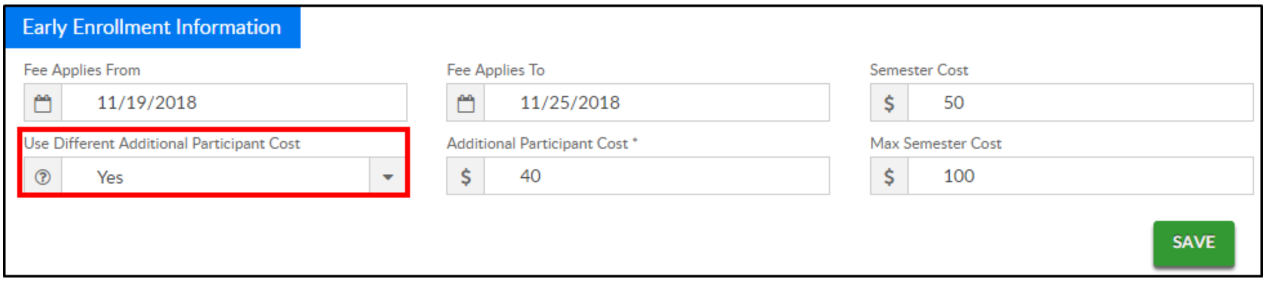
    - Fee Applies To – enter the end date of early enrollment


Early Enrollment Information
Fee Applies From: 11/19/2018
Fee Applies To: 11/25/2018
Semester Cost: $ 50
Use Different Additional Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100

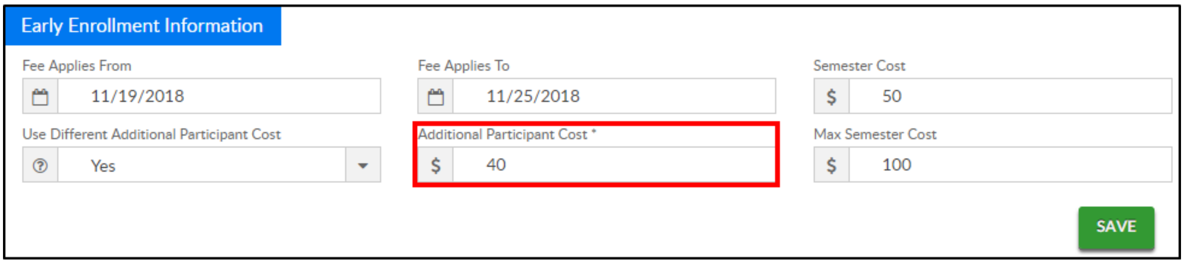
- Semester Cost – enter the semester cost for a student during early enrollment


Early Enrollment Information
Fee Applies From: 11/19/2018
Fee Applies To: 11/25/2018
Semester Cost: $ 50
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 40
Max Semester Cost: $ 100

- Use Different Additional Participant Cost

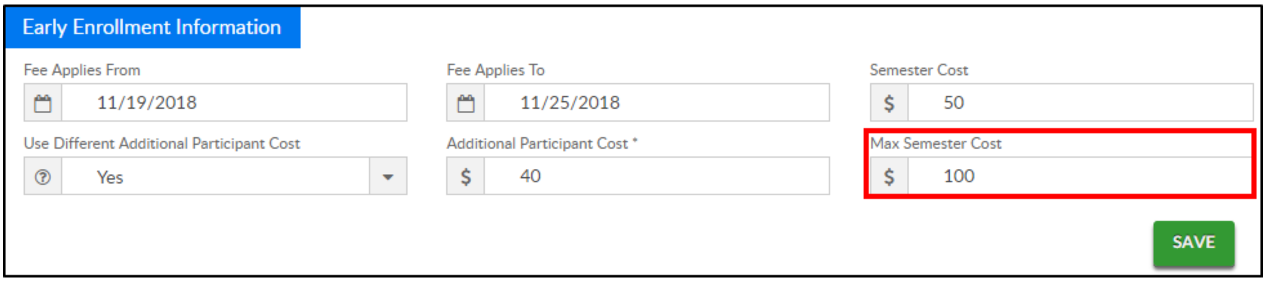

Early Enrollment Information
Fee Applies From: 11/19/2018
Fee Applies To: 11/25/2018
Semester Cost: $ 50
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 40
Max Semester Cost: $ 100

    - Yes – setup fee for additional students for early enrollment. If yes, setup Additional Participant Cost


Early Enrollment Information
Fee Applies From: 11/19/2018
Fee Applies To: 11/25/2018
Semester Cost: $ 50
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 40
Max Semester Cost: $ 100

    - No – do not setup fee for additional students for early enrollment

- Max Semester Cost – maximum amount charged for the semester during early enrollment


Early Enrollment Information
Fee Applies From: 11/19/2018
Fee Applies To: 11/25/2018
Semester Cost: $ 50
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 40
Max Semester Cost: $ 100

12. Click

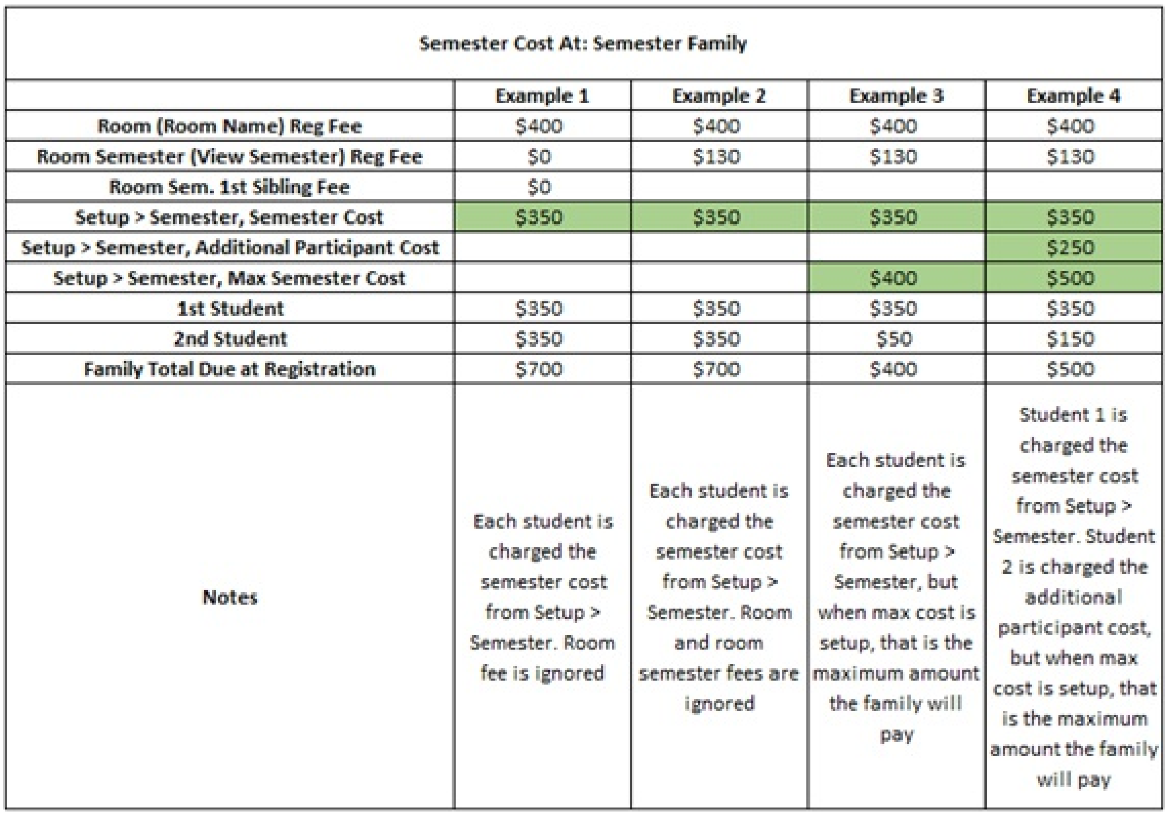
- Save - save the semester details
- Open Enrollment - save the semester details and open the semester and

rooms/programs for registration

- Close Enrollment - close the semester and room/programs associated. Semester becomes Inactive
- Cancel Enrollment - cancelled semesters will cancel the room, but the semester still appears as Active

Fee Examples

The chart below describes how families are charged based on where the fees are entered:



Semester Cost At: Semester Family

	Example 1	Example 2	Example 3	Example 4
Room (Room Name) Reg Fee	$400	$400	$400	$400
Room Semester (View Semester) Reg Fee	$0	$130	$130	$130
Room Sem. 1st Sibling Fee	$0			
Setup > Semester, Semester Cost	$350	$350	$350	$350
Setup > Semester, Additional Participant Cost				$250
Setup > Semester, Max Semester Cost			$400	$500
1st Student	$350	$350	$350	$350
2nd Student	$350	$350	$50	$150
Family Total Due at Registration	$700	$700	$400	$500
Notes	Each student is charged the semester cost from Setup > Semester. Room fee is ignored	Each student is charged the semester cost from Setup > Semester. Room and room semester fees are ignored	Each student is charged the semester cost from Setup > Semester, but when max cost is setup, that is the maximum amount the family will pay	Student 1 is charged the semester cost from Setup > Semester. Student 2 is charged the additional participant cost, but when max cost is setup, that is the maximum amount the family will pay

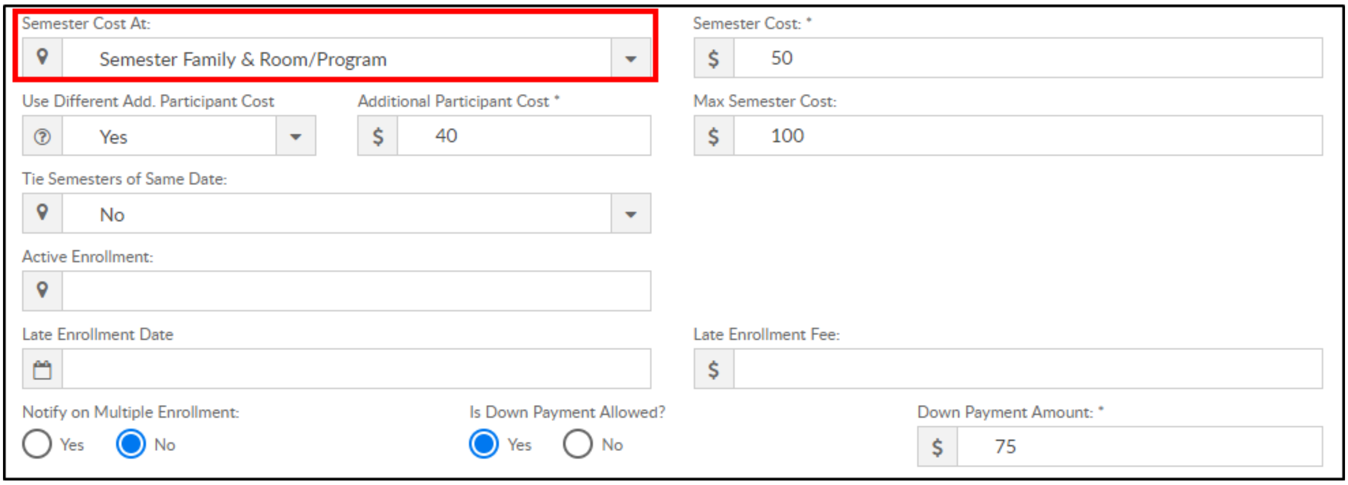
Setup > Semester, Semester Family & Room/Program

Last Modified on 12/28/2018 11:01 am EST

There are 4 “Semester Cost At” options to choose from when creating a new semester; Room/Program, Semester Participant, Semester Family, and Semester Family & Room/Program. Once steps 1-8 are completed from the Setup > Semester article, follow the steps below to set up a Semester Family & Room/Program semester:

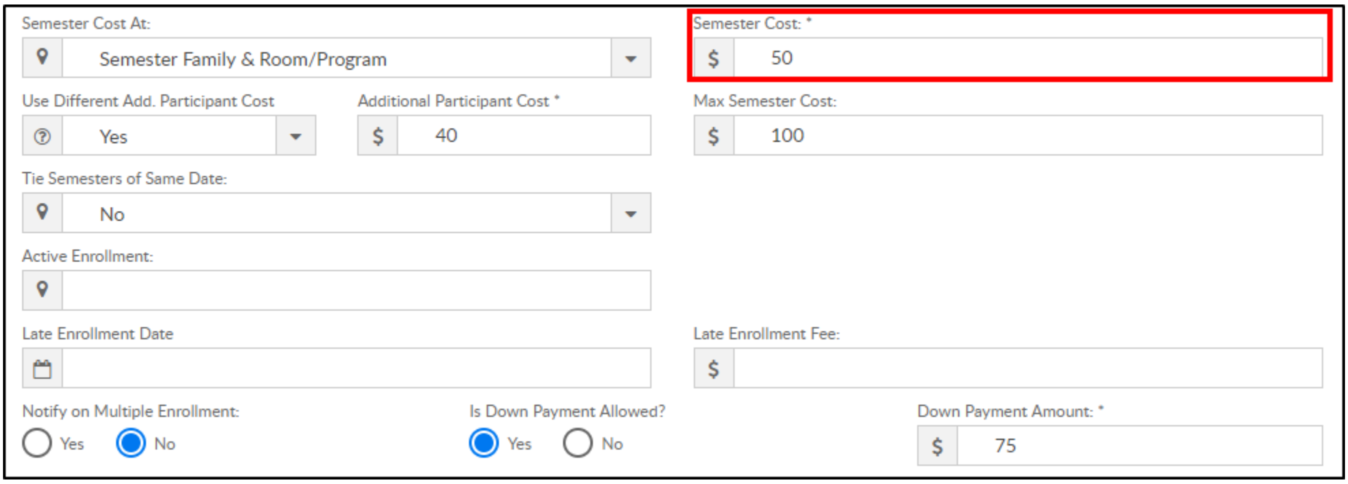
Please Note: When using Semester Cost At "Semester Family & Room/Program", Semester Cost fee will be charged and fees setup at the room level. The room level fees will pull from the Room Semester (View Semester) screen **first**. If there are no fees setup in room semester, fees will pull from the Room Configuration screen. Click here for registration fee examples or see the bottom of this page.

1. Semester Cost At – Semester Family & Room/Program



Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

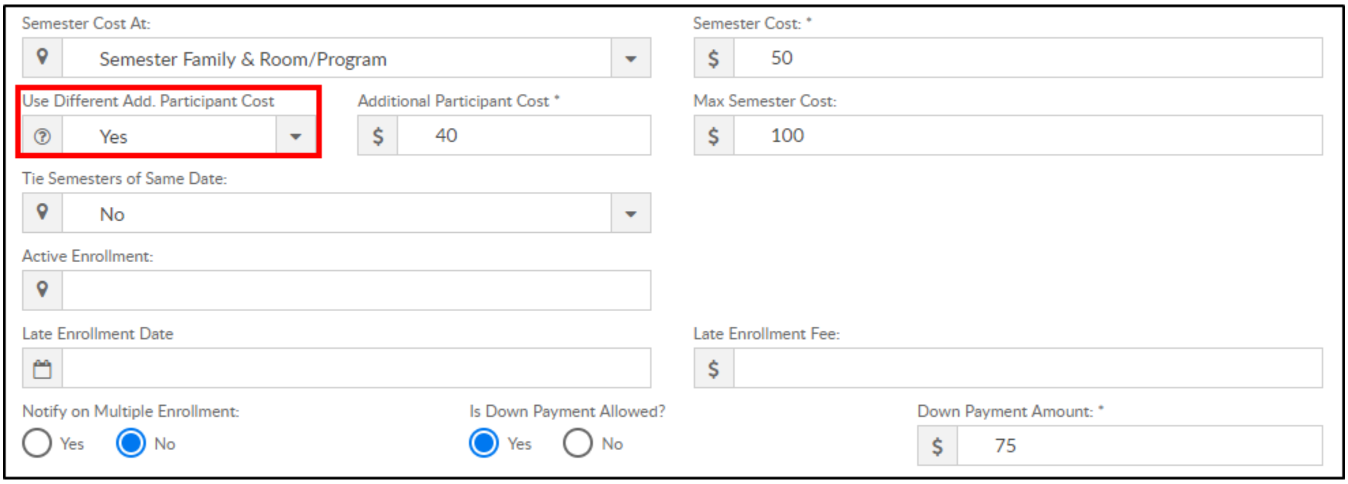
2. Semester Cost – enter the semester fee to be charged. **Please Note**: this fee will be charged per student if the Use Different Add. Participant Cost is set to No



Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

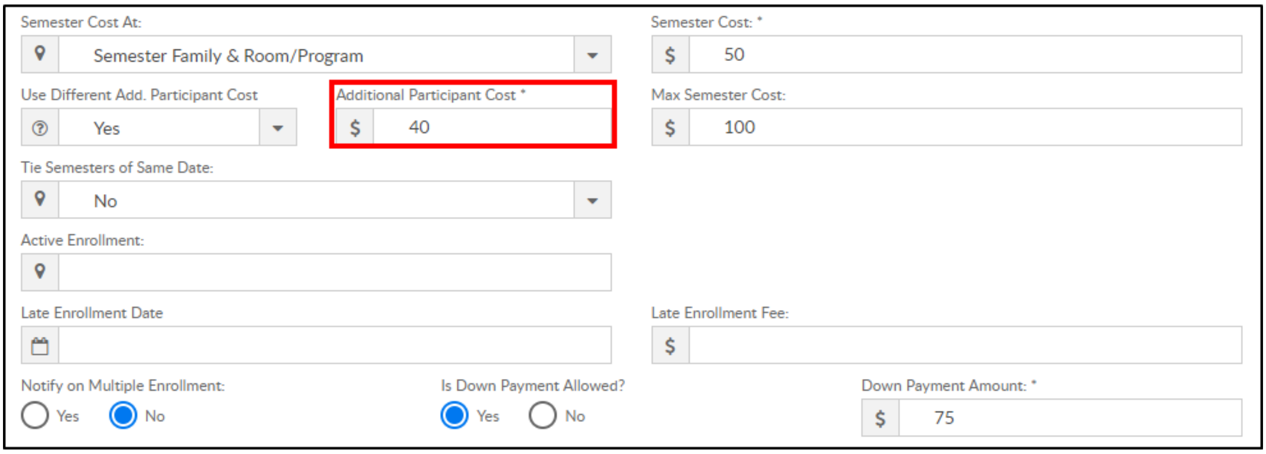
3. Use Different Add. Participant Cost – this allows a different fee to be setup for

additional students after the first student registers



Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

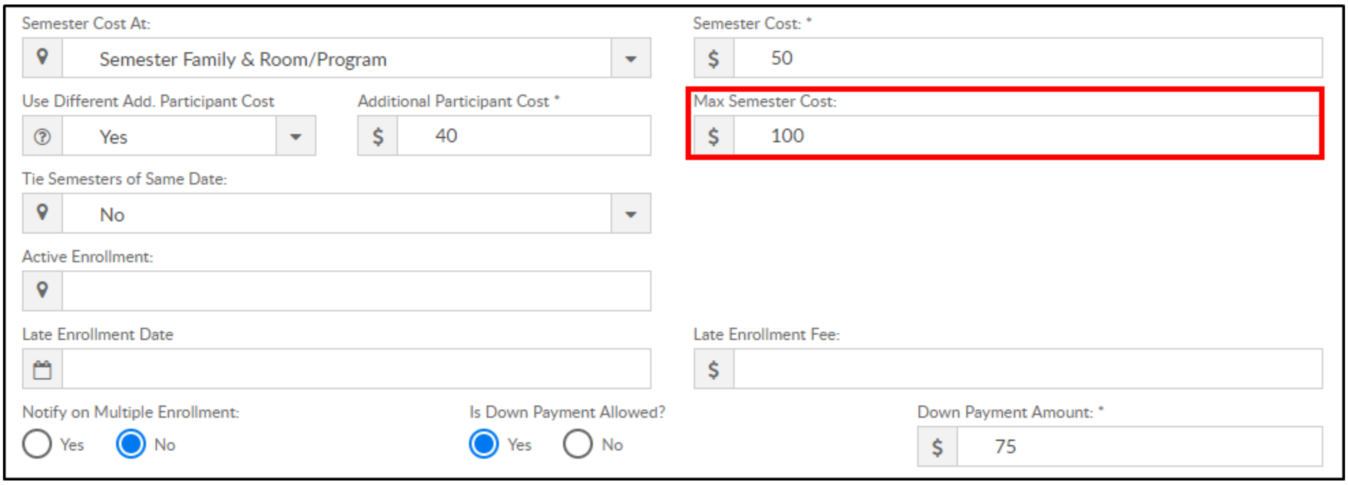
- Yes – setup a different fee per additional student (after the first). If yes, Additional Participant Cost is required. Enter the fee for additional students. **Please Note:** If this field is left blank, it will charge the Semester Cost for additional students. If additional students should not be charged a fee, enter 0.00 in this field



Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

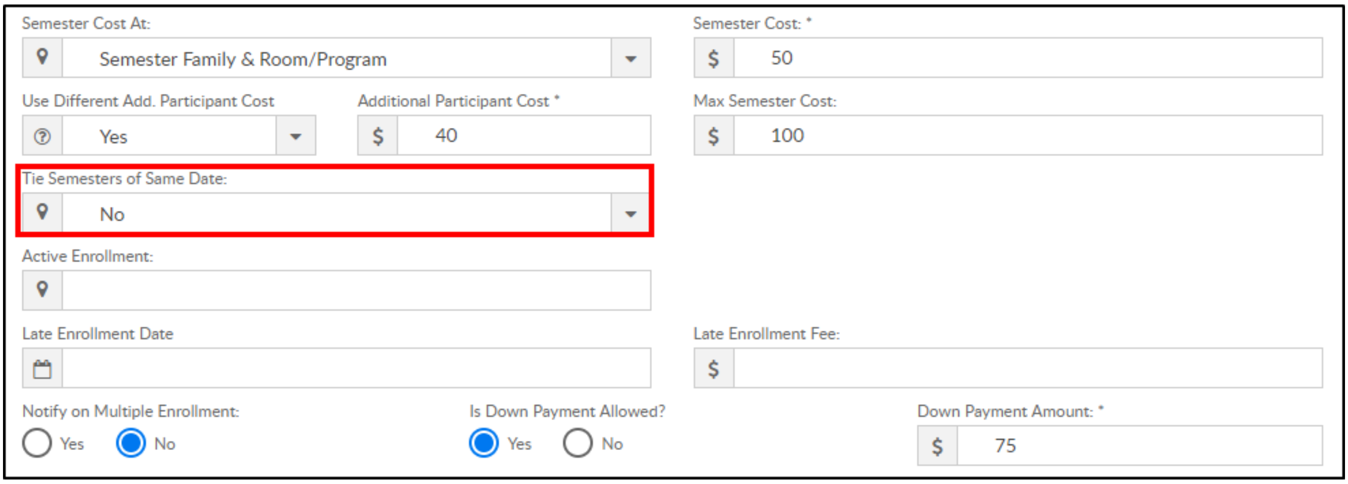
- No – do not setup a fee for additional students. Additional students will be charged the Semester Cost

4. Max Semester Cost – total maximum fee charged to a family for this semester. **Please Note:** this total <u>does not</u> include the fees added in the Room configuration



Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

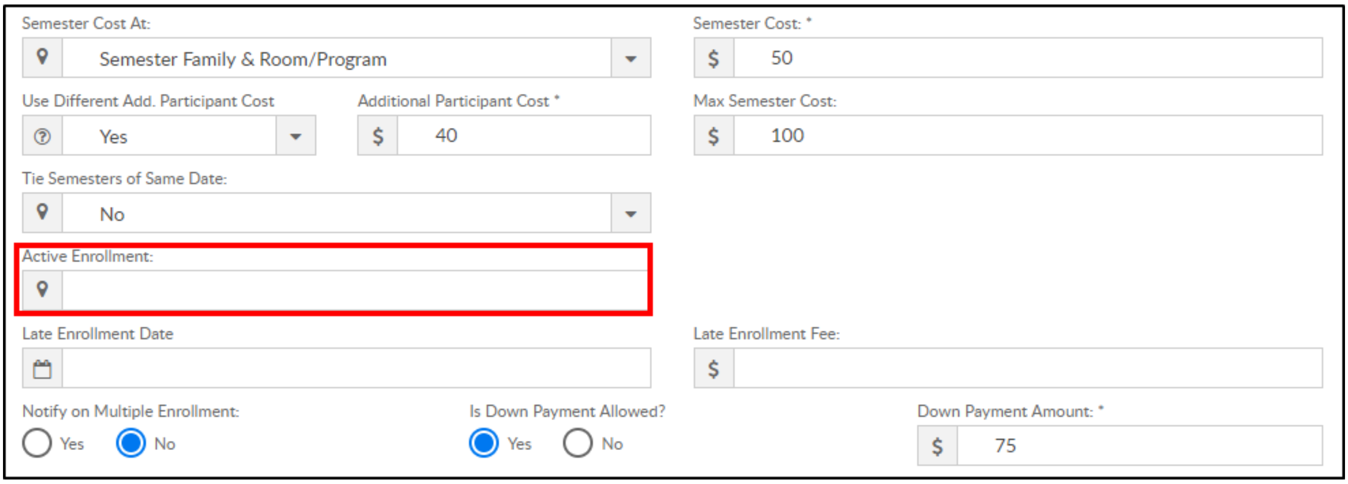
5. Tie Semesters of Same Date



Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

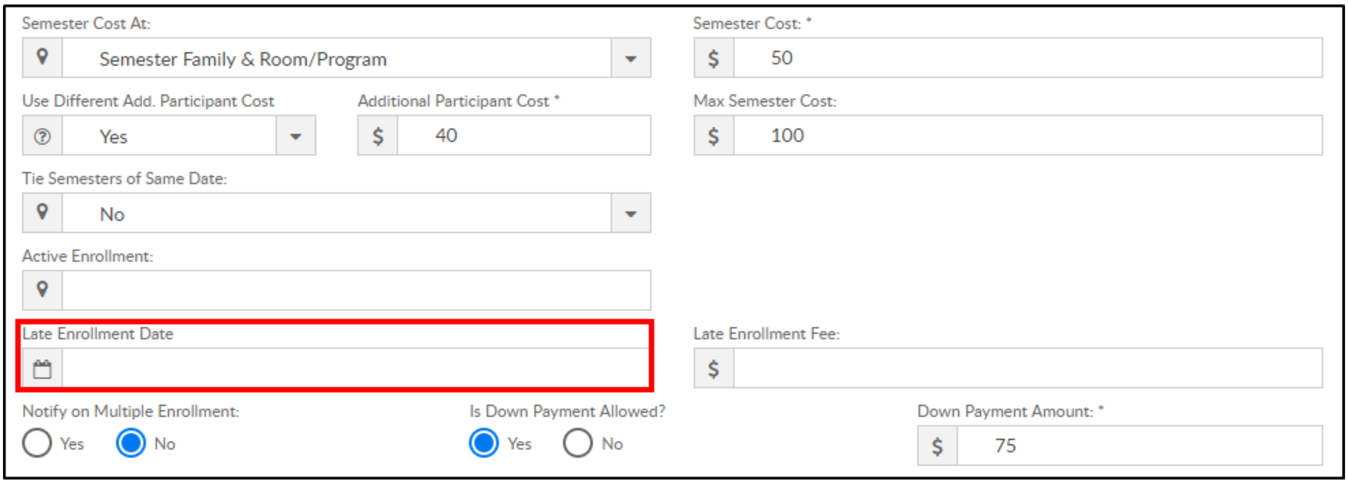
  - Yes – all semesters with the same start and end dates should be tied together. Tied semesters will only charge the student one semester cost. **Recommendation**: all tied semesters should have the same Semester Cost and Semester Cost At setup
  - No – do not tie semesters of the same dates together

6. Active Enrollment – leave blank when creating a new semester. During active enrollment, this field will display number of students currently enrolled



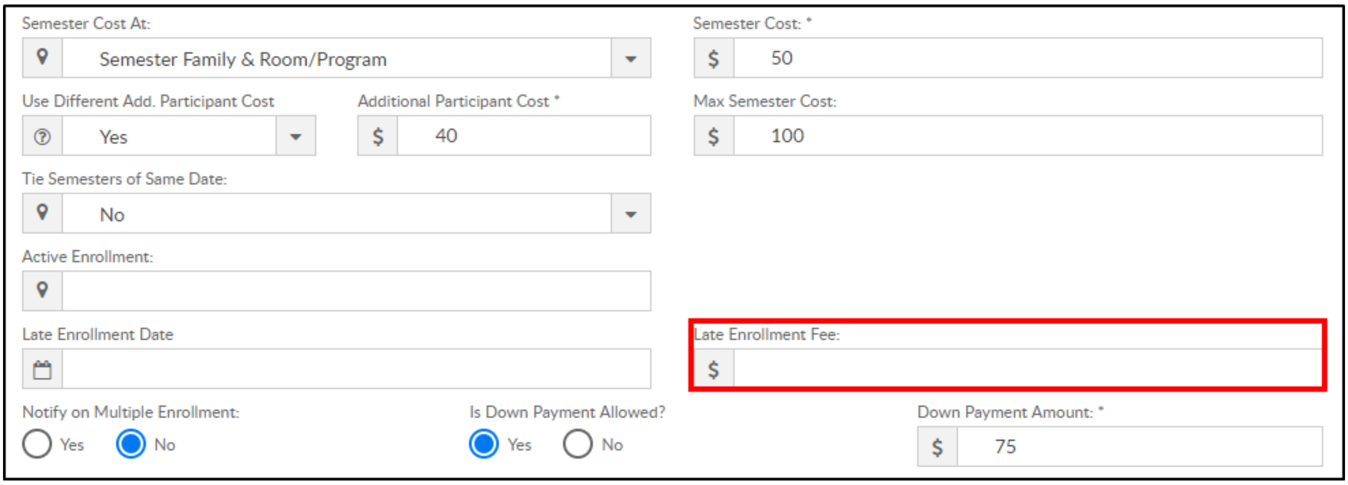
Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

7. Late Enrollment Date – if a family will be charged a late registration fee on top of the regular registration fee, enter the date the late enrollment will begin



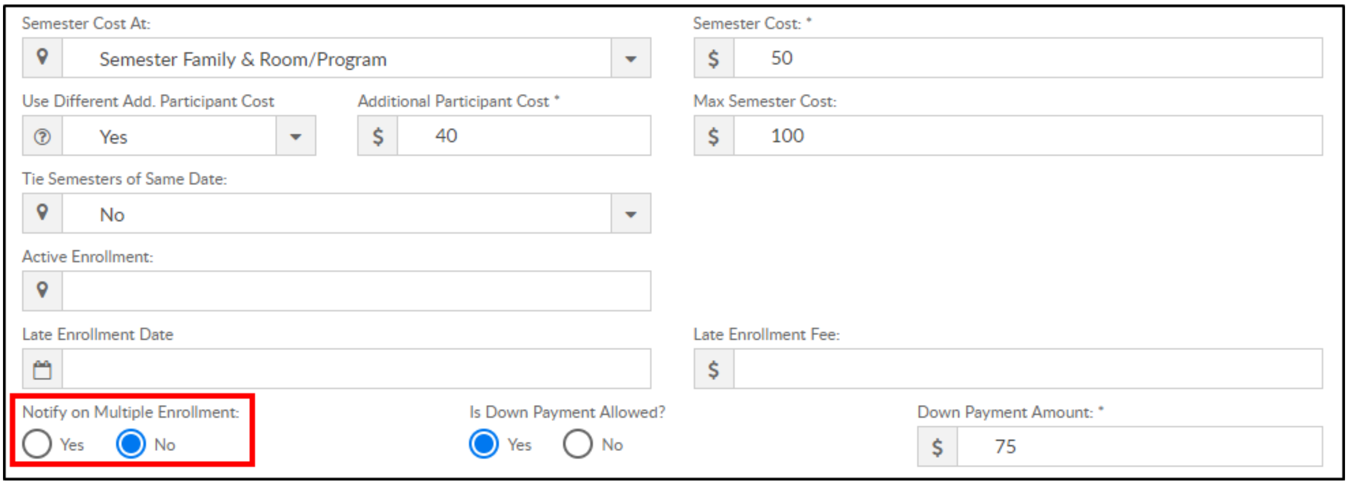
Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

8. Late Enrollment Fee – enter the late registration fee



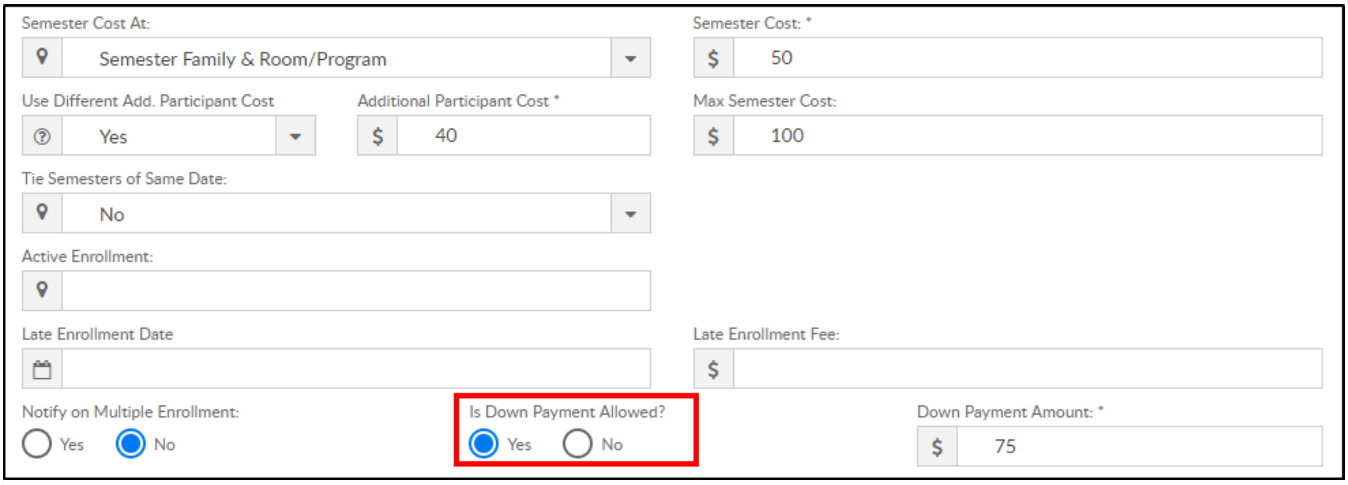
Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

9. Notify on Multiple Enrollment – if an existing student registers via the Connect Portal for multiple programs within the same semester, the parent will receive a warning message on that portal registration session

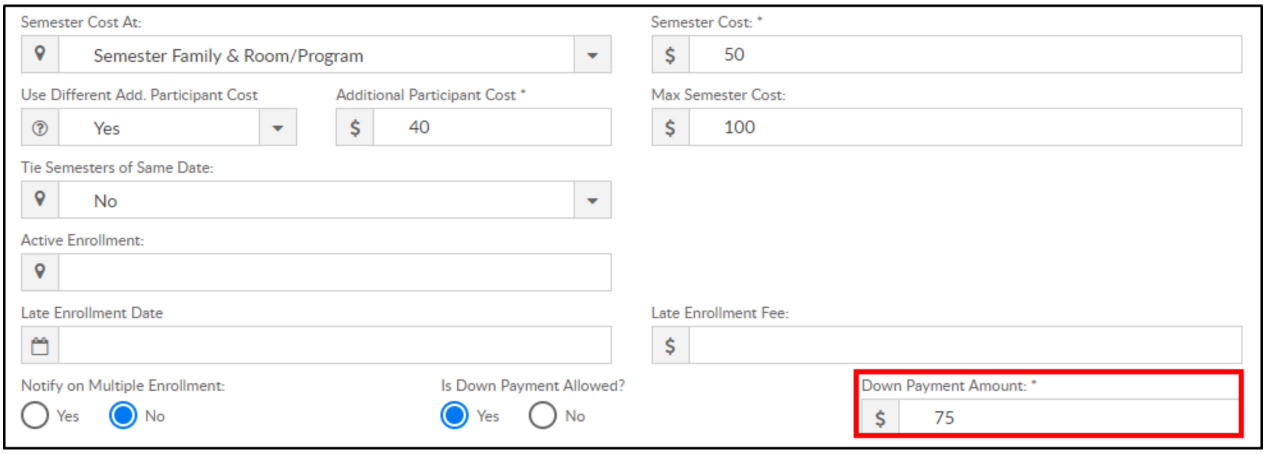


Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

10. Is Down Payment Allowed?

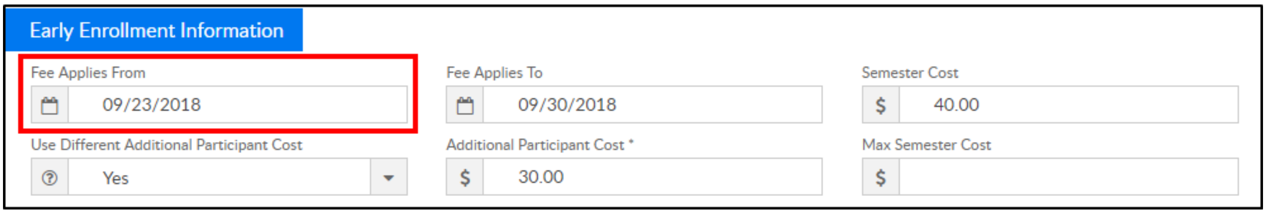

Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

  - Yes – a down payment must be made to register. If yes, Down Payment Amount is required


Semester Cost At: Semester Family & Room/Program
Semester Cost: * $ 50
Use Different Add. Participant Cost: Yes
Additional Participant Cost * $ 40
Max Semester Cost: $ 100
Tie Semesters of Same Date: No
Active Enrollment:
Late Enrollment Date
Late Enrollment Fee: $
Notify on Multiple Enrollment: ○ Yes ● No
Is Down Payment Allowed? ● Yes ○ No
Down Payment Amount: * $ 75

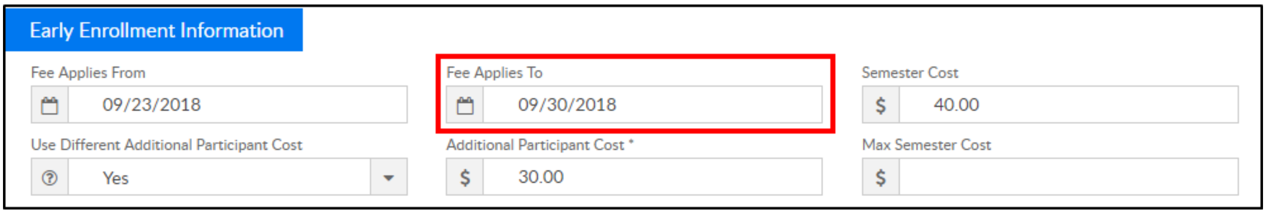
  - No – a down payment is not allowed/required

11. Early Enrollment Information - if families can register during an early enrollment period, complete the options below
  - Fee Applies From – enter the start date for early enrollment



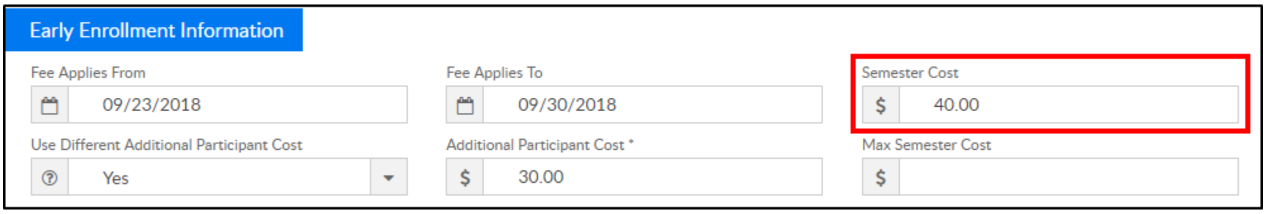
Fee Applies From 09/23/2018
Fee Applies To 09/30/2018
Semester Cost $ 40.00
Use Different Additional Participant Cost: Yes
Additional Participant Cost * $ 30.00
Max Semester Cost $

  - Fee Applies To – enter the end date of early enrollment

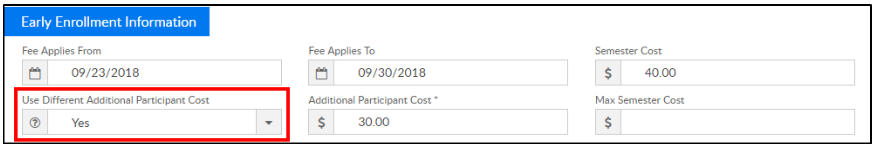


Fee Applies From 09/23/2018
Fee Applies To 09/30/2018
Semester Cost $ 40.00
Use Different Additional Participant Cost: Yes
Additional Participant Cost * $ 30.00
Max Semester Cost $

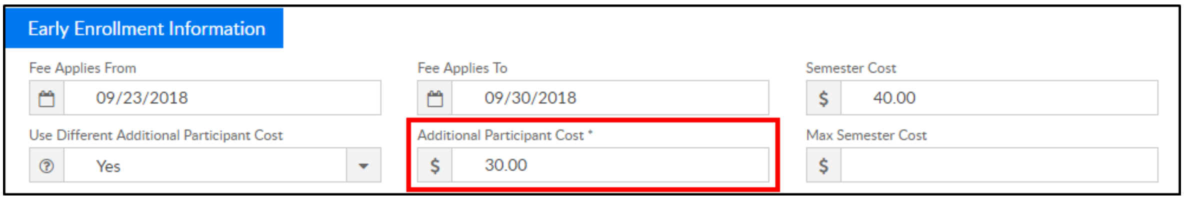
  - Semester Cost – enter the semester cost for a student during early enrollment


Early Enrollment Information
Fee Applies From: 09/23/2018
Fee Applies To: 09/30/2018
Semester Cost: $ 40.00
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 30.00
Max Semester Cost: $

- Use Different Additional Participant Cost

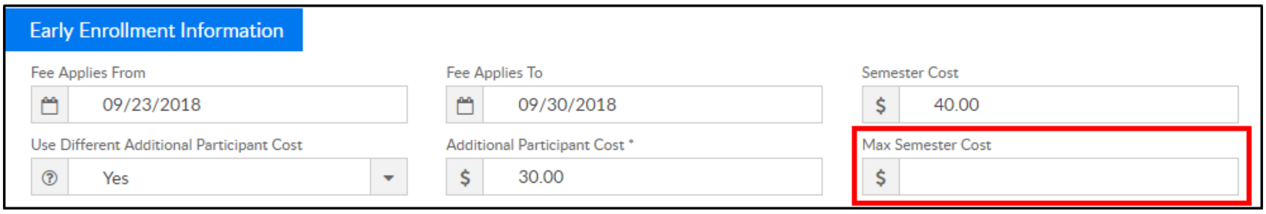

Early Enrollment Information
Fee Applies From: 09/23/2018
Fee Applies To: 09/30/2018
Semester Cost: $ 40.00
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 30.00
Max Semester Cost: $

    - Yes – setup fee for additional students for early enrollment. If yes, setup Additional Participant Cost


Early Enrollment Information
Fee Applies From: 09/23/2018
Fee Applies To: 09/30/2018
Semester Cost: $ 40.00
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 30.00
Max Semester Cost: $

    - No – do not setup fee for additional students for early enrollment

- Max Semester Cost – maximum amount charged for the semester during early enrollment

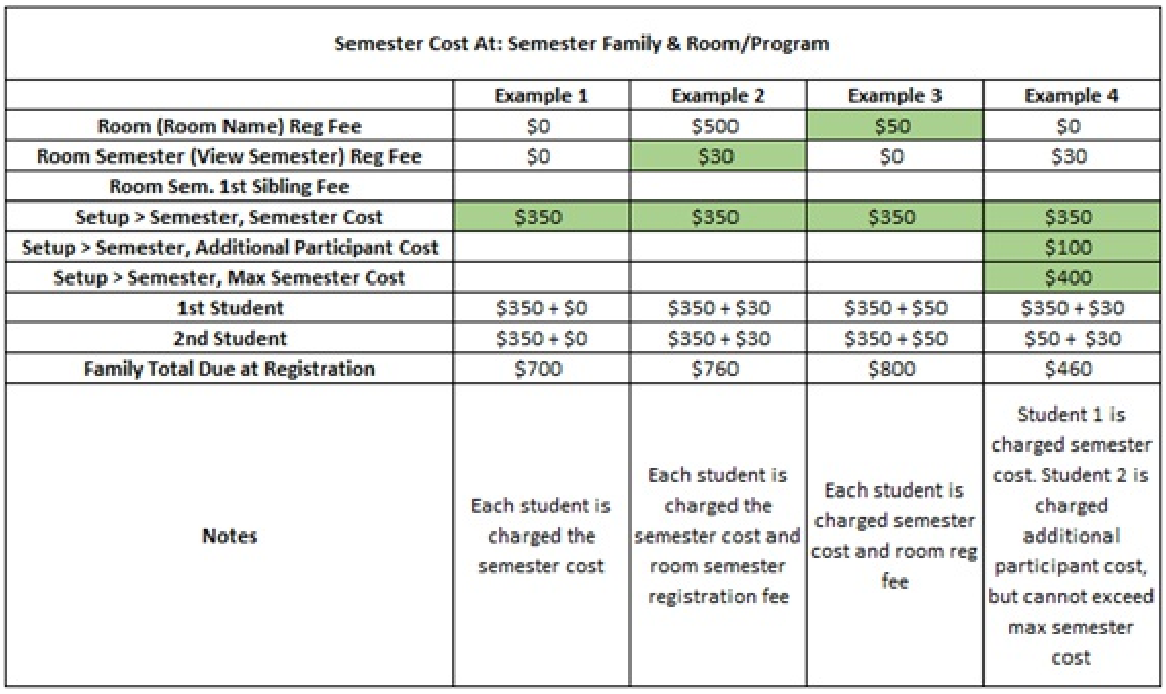

Early Enrollment Information
Fee Applies From: 09/23/2018
Fee Applies To: 09/30/2018
Semester Cost: $ 40.00
Use Different Additional Participant Cost: Yes
Additional Participant Cost *: $ 30.00
Max Semester Cost: $

12. Click

- Save - save the semester details
- Open Enrollment - save the semester details and open the semester and rooms/programs for registration
- Close Enrollment - close the semester and room/programs associated. Semester becomes Inactive
- Cancel Enrollment - cancelled semesters will cancel the room, but the semester still appears as Active

Fee Examples

The chart below describes how families are charged based on where the fees are entered:



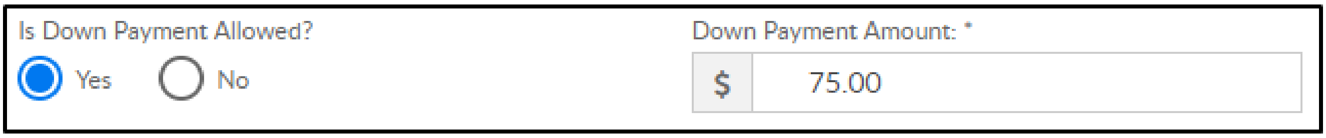
Semester Cost At: Semester Family & Room/Program

	Example 1	Example 2	Example 3	Example 4
Room (Room Name) Reg Fee	$0	$500	$50	$0
Room Semester (View Semester) Reg Fee	$0	$30	$0	$30
Room Sem. 1st Sibling Fee				
Setup > Semester, Semester Cost	$350	$350	$350	$350
Setup > Semester, Additional Participant Cost				$100
Setup > Semester, Max Semester Cost				$400
1st Student	$350 + $0	$350 + $30	$350 + $50	$350 + $30
2nd Student	$350 + $0	$350 + $30	$350 + $50	$50 + $30
Family Total Due at Registration	$700	$760	$800	$460
Notes	Each student is charged the semester cost	Each student is charged the semester cost and room semester registration fee	Each student is charged semester cost and room reg fee	Student 1 is charged semester cost. Student 2 is charged additional participant cost, but cannot exceed max semester cost

Semester Down Payment Information

Last Modified on 12/28/2018 11:08 am EST

When creating a new semester, there is an option to allow for down payments during registration. If the option for "Is Down Payment Allowed?" is set to Yes, the down payment amount must be entered in the Down Payment Amount field.

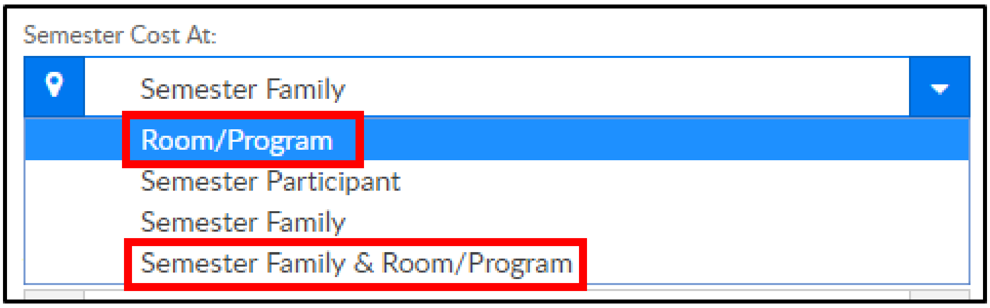


Is Down Payment Allowed? ● Yes ○ No

Down Payment Amount: * $ 75.00

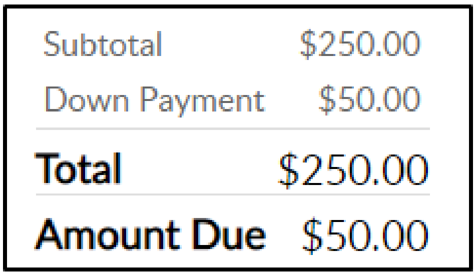
Down Payment Facts

- If there is a down payment amount setup, that is the amount that will be due upon registration. Families are not able to pay more or less than the down payment amount
    - For example, if the semester cost is $300 and the down payment amount is $100, only $100 is due at registration
- The down payment amount is per family, not per student or semester
- When creating a semester, if the Semester Cost At is "Room/Program" or "Semester Family & Room/Program", the following rule applies:



Semester Cost At: Semester Family

    - If the down payment amount is more than the cost of the room, the system will consider the room cost as down payment
    - For example, if the down payment amount is $75.00 and the room cost is $50.00, only $50.00 will be due at registration
- If a student is registering into different semesters with different down-payment amounts, the highest down payment amount will be required
- Prebill, Discounts, Scholarship codes, and extra fees setup will be considered towards the Subtotal, not the Total



Subtotal	$250.00
Down Payment	$50.00
Total	$250.00
Amount Due	$50.00

- Service fees are charged on top of down payment
- The highest down payment will always be required, unless the Subtotal is a lesser amount

Setup > Classroom

Last Modified on 11/30/2018 2:16 pm EST

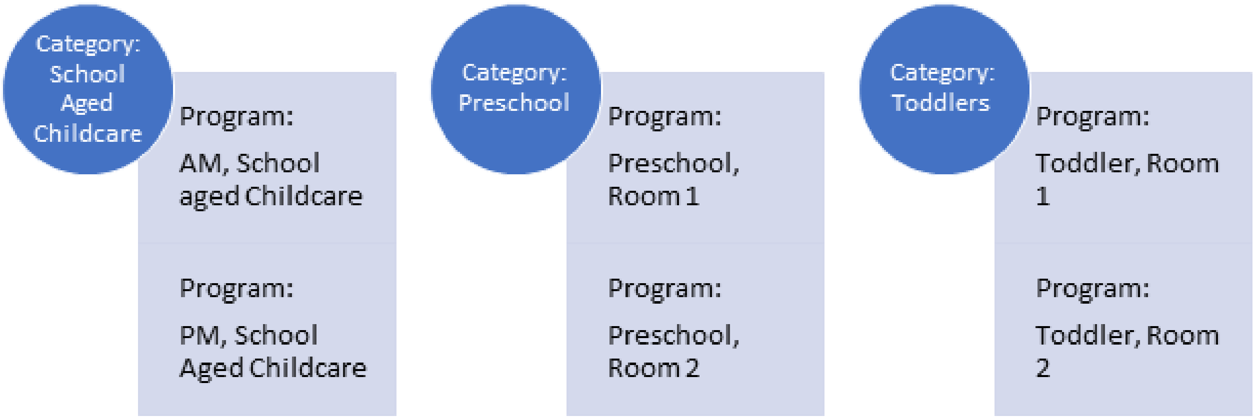
The setup > classroom area is where administrators will create programming or the roster options children can be associated with in the system.

A classroom could be a physical room, it could be a program, a registration only room.

When thinking of classrooms in the system think of them as ways administrators can group children- for attendance, registration or communication purposes.

There is a hierarchy in the system classroom is the lowest level, over that there are categories. Categories the general grouping of rooms.

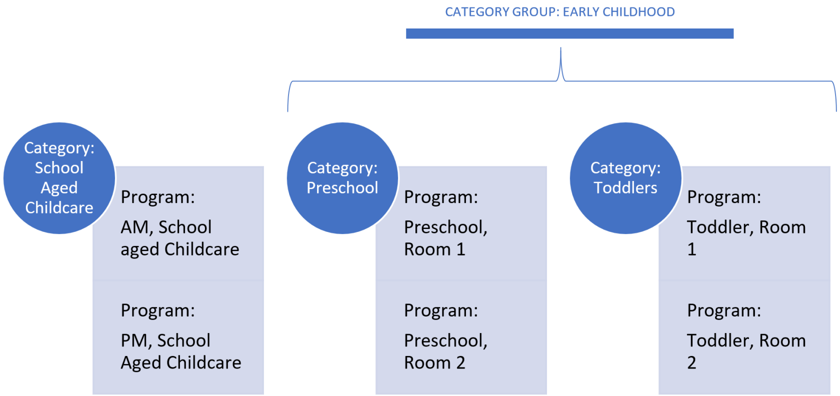
Example- If a site has early childhood programs, the categories may be Infant, Toddler, Preschool. Under each of those categories the rooms might be Infant 1, Infant 2, Toddler 1, Toddler 2, Preschool 1, Preschool 2.



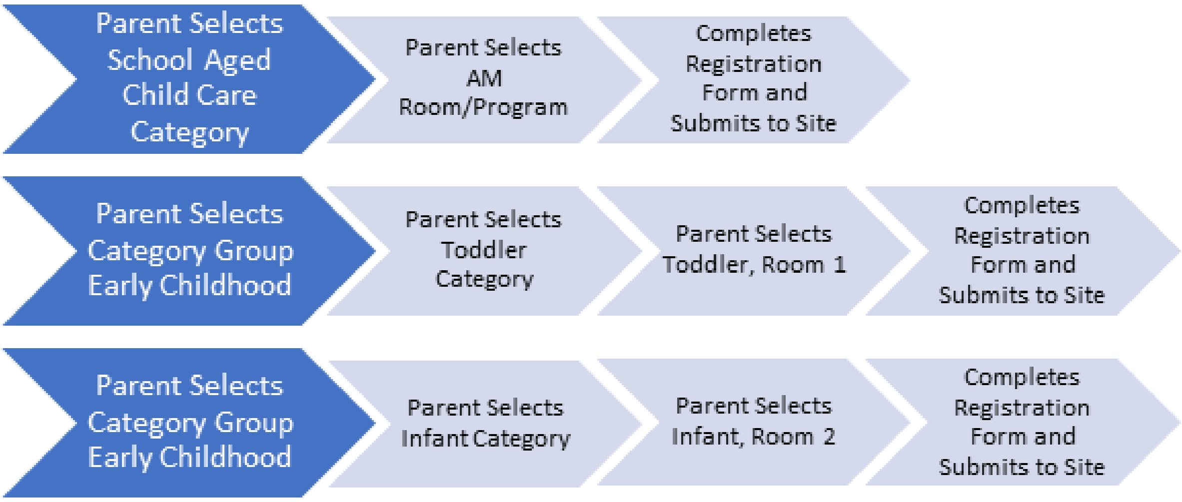
When trying to pull reports a site could pull reports for a specific school > room or a specific school > category to see all children enrolled in the programs under the category.

If an additional layer of grouping is needed, categories can be combined into category groups. Category Groups are a collection of categories- and mostly are used for registration purposes (when parents will be registering through the new registration page or the portal).

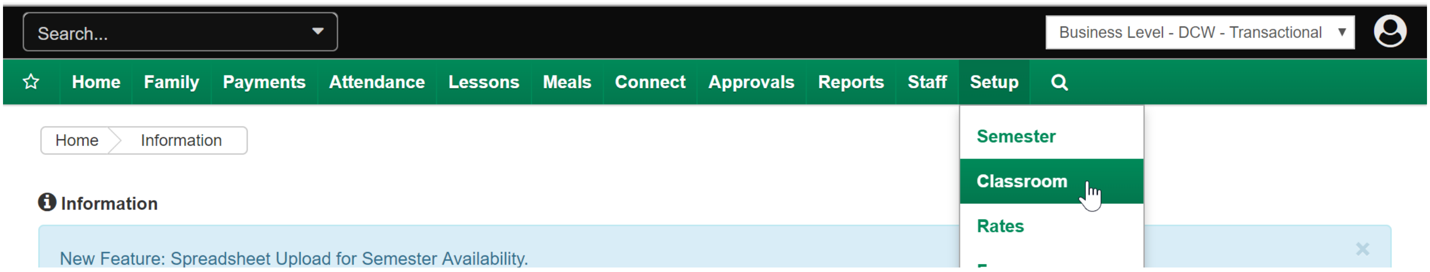
Example- a site may choose to have all of their Early Childhood Programs in one category group. Category groups are optional and only needed if an extra layer is wanted when a parent is selecting a program for their child.



All Categories do not need to be part of a category group. If there are three categories- two can be added to a category group and the third can just remain with no category. When registering through the registration page the flow will be:



Navigate to the setup area to create or maintain category groups, categories or rooms. From the Setup menu option select Classroom/Room/Program from the drop down list-



New Feature: Spreadsheet Upload for Semester Availability.

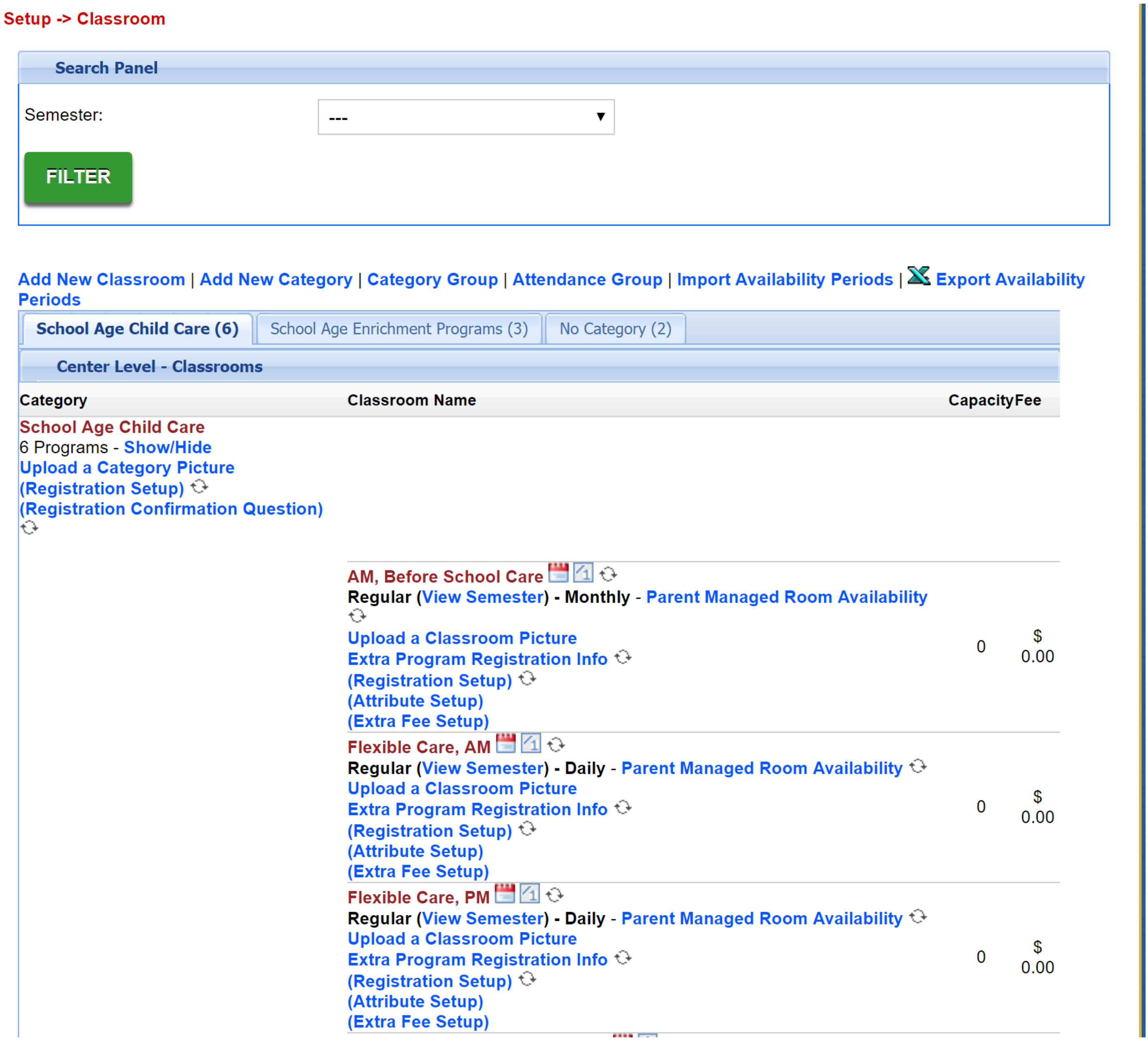
On the Setup > Classroom page there are a couple of key features, most importantly on the top of the center level- classrooms box available categories will display.

Select a tab to display the room/programs underneath.

Once a tab is selected the category setup information will display on the left side. On the right, the programs/rooms will display.

To edit categories or programs select the name of the category or program that needs to be edited.

□The settings for either category or classroom will open below the center level- classrooms box.



Setup -> Classroom

Search Panel

Semester: ---

Add New Classroom | Add New Category | Category Group | Attendance Group | Import Availability Periods | Export Availability Periods

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Age Child Care 6 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, AM Regular (View Semester) - Daily - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, PM Regular (View Semester) - Daily - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

Under the category the below options will display-

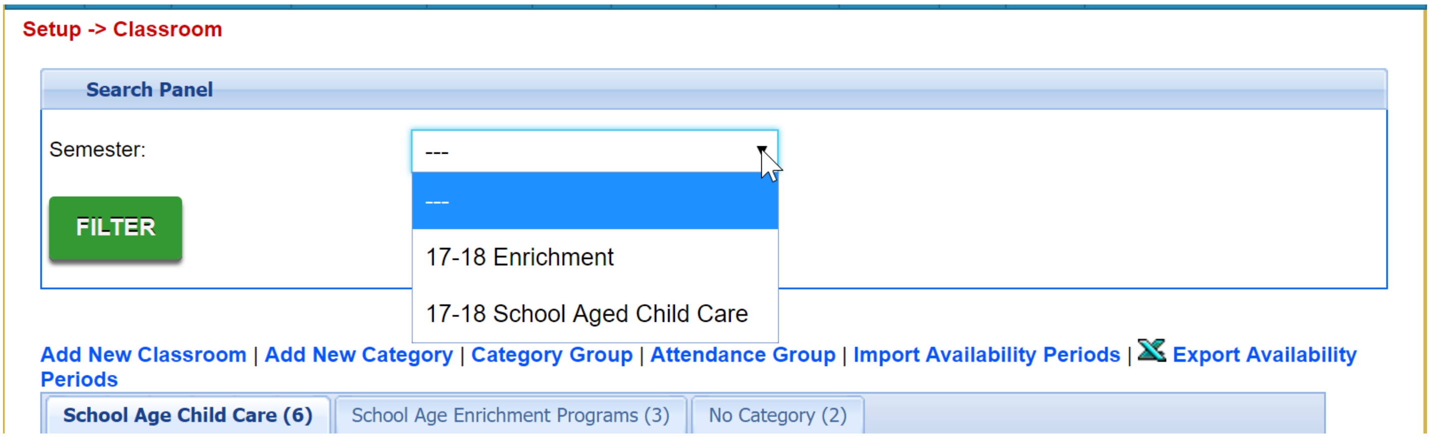
- Upload a category picture- this allows a user to upload an image that can display during registration on the registration page
- Registration Setup- this is where registration questions can be displayed, hidden or required. If all room/programs under the category have the same question requirements ONLY set the questions at the category level. If room/programs have varying question requirements select the registration setup link under the room/program name.
    - If questions are set at the room/program level the registration setup settings at the category level are ignored.
- Registration Confirmation Questions- this is where statements can be added that parents will need to agree to before completing registration, example statements are-
    - I agree to the financial policies of CENTER NAME.
    - I have received a copy of the parent handbook from CENTER NAME.
    - I understand if my child does not adhere to behavior policies of CENTER NAME we will be asked to leave.

Under each classroom, the below options display-

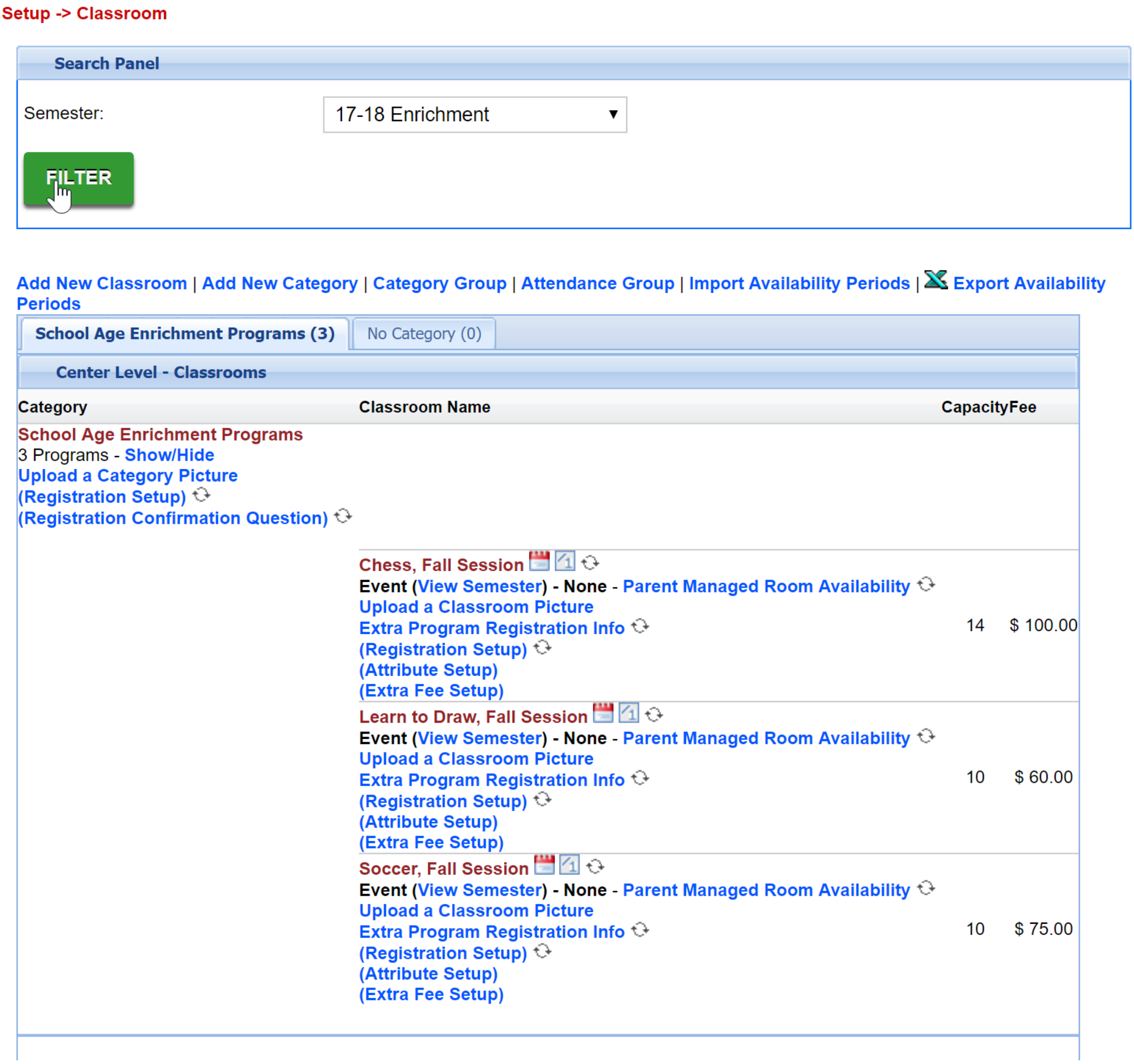
- Room type will display as the first text field below the room name, the options here will be regular (parent managed, recurring billing) or event
- (View Semester) this is where semesters can be added or edited for each room/program.
- Parent Managed Room Availability- this is where days can be set for selection if a room is a parent managed calendar room
- Upload a classroom picture- this allows a user to upload an image that can display during registration on the registration page
- Extra Program Registration Info- this is where additional questions can be added, questions are input by users and can require text or multiple choice responses.
- Registration setup-this is where registration questions can be displayed, hidden or required. If all room/programs under the category have the same question requirements ONLY set the questions at the category level. If room/programs

have varying question requirements select the registration setup link under the room/program name.
    - If questions are set at the room/program level the registration setup settings at the category level are ignored.
- Attribute Setup- classroom attributes are assigned categories or topics for classrooms in the center. These attributes can be used by parents when searching for a particular classroom through the Connect Portal. Topics could include outdoor sports, team sports or science activities. (Attributes are setup under Setup > System Config, Valid Values)
- Extra Fee Setup- this is where additional fees can be added to a room, this might be used if there is a materials fee for a particular room, if there are optional purchases available. The fee can be set to optional or required.

The semester selection box will allow users to see only rooms associated to particular semesters. Select the drop down box, then select Filter.



The screen will refresh and only display program/rooms that have been added to the selected semester, notice only the category with rooms associated to the selected semester will display-


Setup -> Classroom

Search Panel

Semester: 17-18 Enrichment

Add New Classroom | Add New Category | Category Group | Attendance Group | Import Availability Periods | Export Availability Periods

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Age Enrichment Programs 3 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	Chess, Fall Session Event (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	14	$ 100.00
	Learn to Draw, Fall Session Event (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	10	$ 60.00
	Soccer, Fall Session Event (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	10	$ 75.00

To add a new classroom select the Add New Classroom option, to add a new category select the Add New Category Option, to add or edit a category group select the Category Group link, to add or edit attendance groups select Attendance Group.

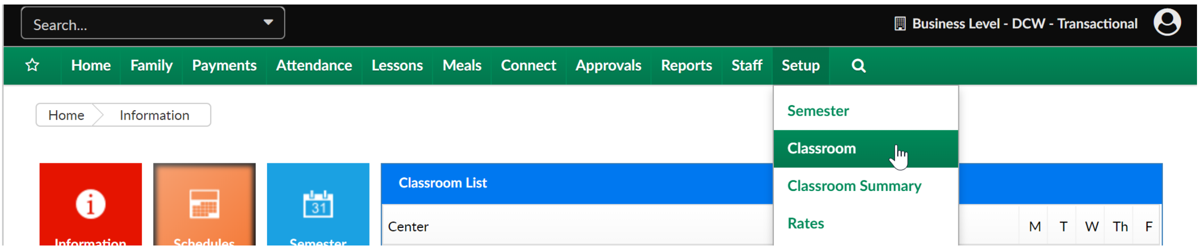
- Add a new classroom
- Add a new category
- Add a new category group

Creating an Event

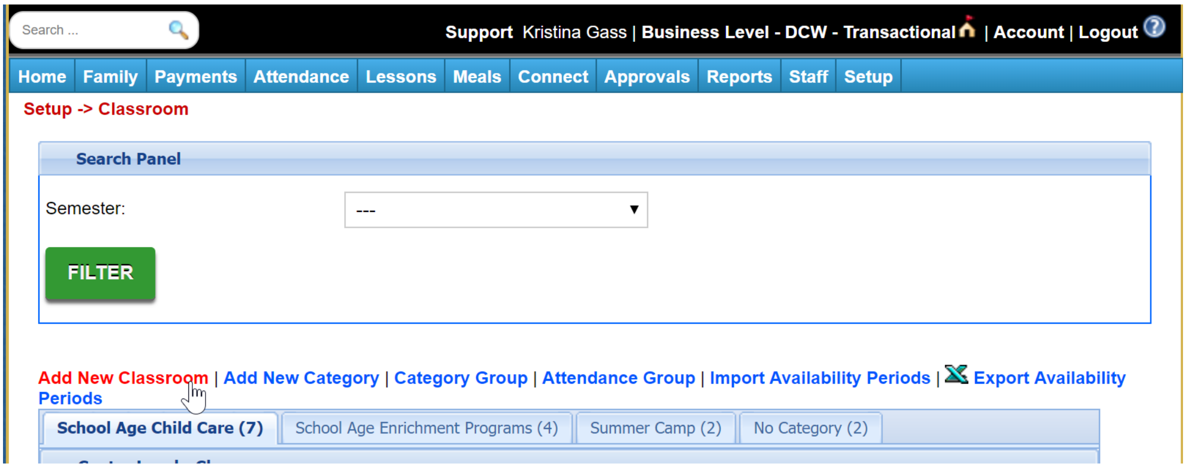
Last Modified on 05/22/2018 11:20 am EDT

Events are classrooms with a one-time charge that is applied to a family's financial ledger during registration. Parents are not billed for events when running billing. The one-time charge for an event is based on the Registration Fee setup for the classroom.

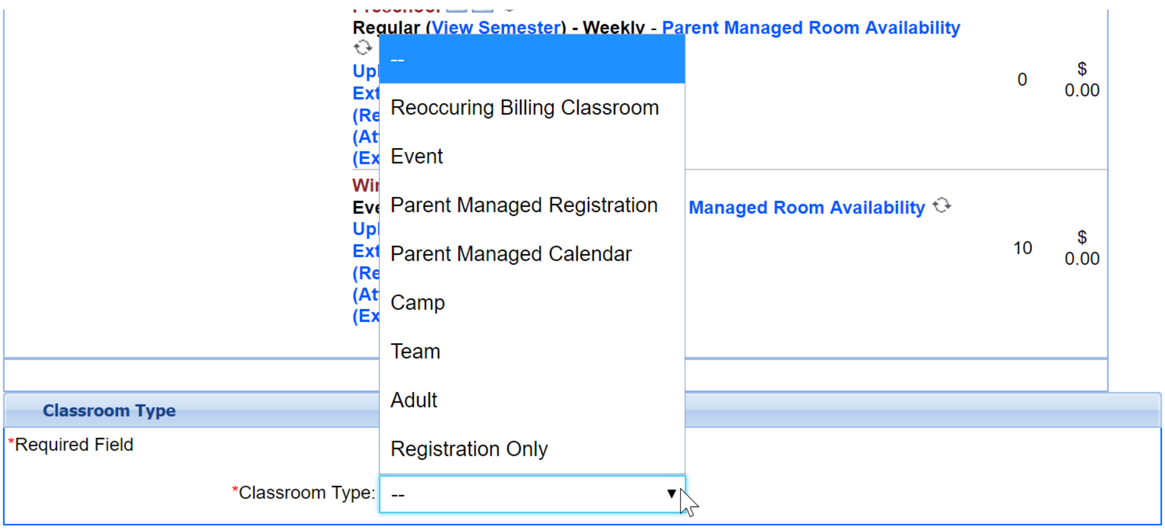
To create an event go to Setup > Room



Then select Add a New Classroom



From the drop down selection box choose the type of program that will be created-



For Events, the below fields are important-

- Room Name
- Classroom Category
- Online Description
- Capacity
- Registration Fee (program cost)
- Add to wait list
- Billing Period- None
- Allow Initial Start Date- No
- Default Days

Once the event has been setup, save- then click on the event name and authorize sites.

Once sites have been authorized add the event to a semester by clicking the (View Semester) link under the event name.

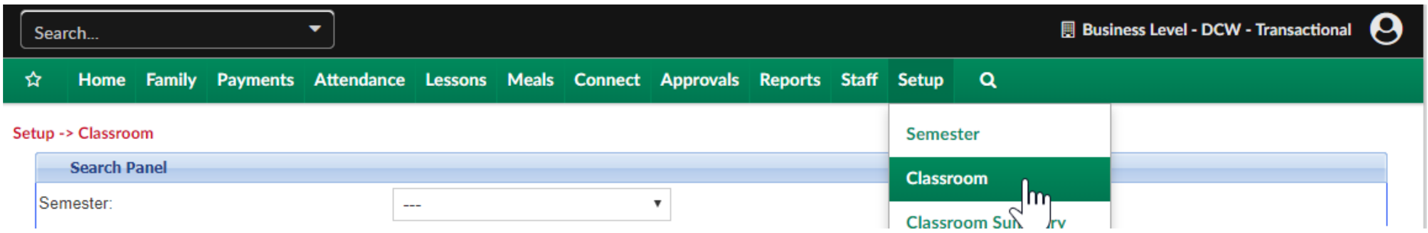
Click here to see how to authorize a room to a semester!

How to clone a room

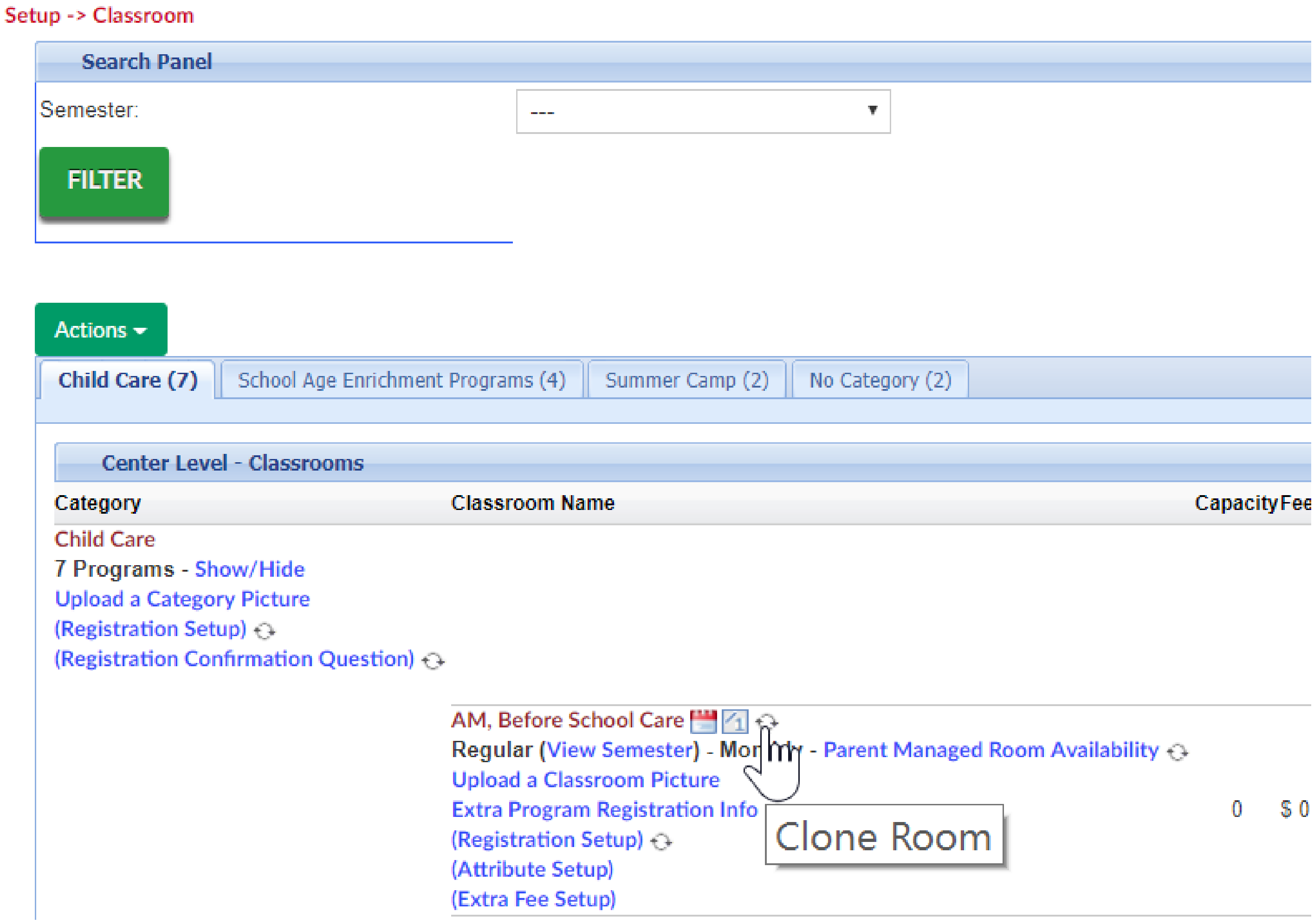
Last Modified on 03/12/2018 3:10 pm EDT

Once a room/program has been setup and configured, the room/program can be cloned if additional options are required.

Go to Setup > Classroom-



Select the clone icon next to the name of the room/program you want to copy-

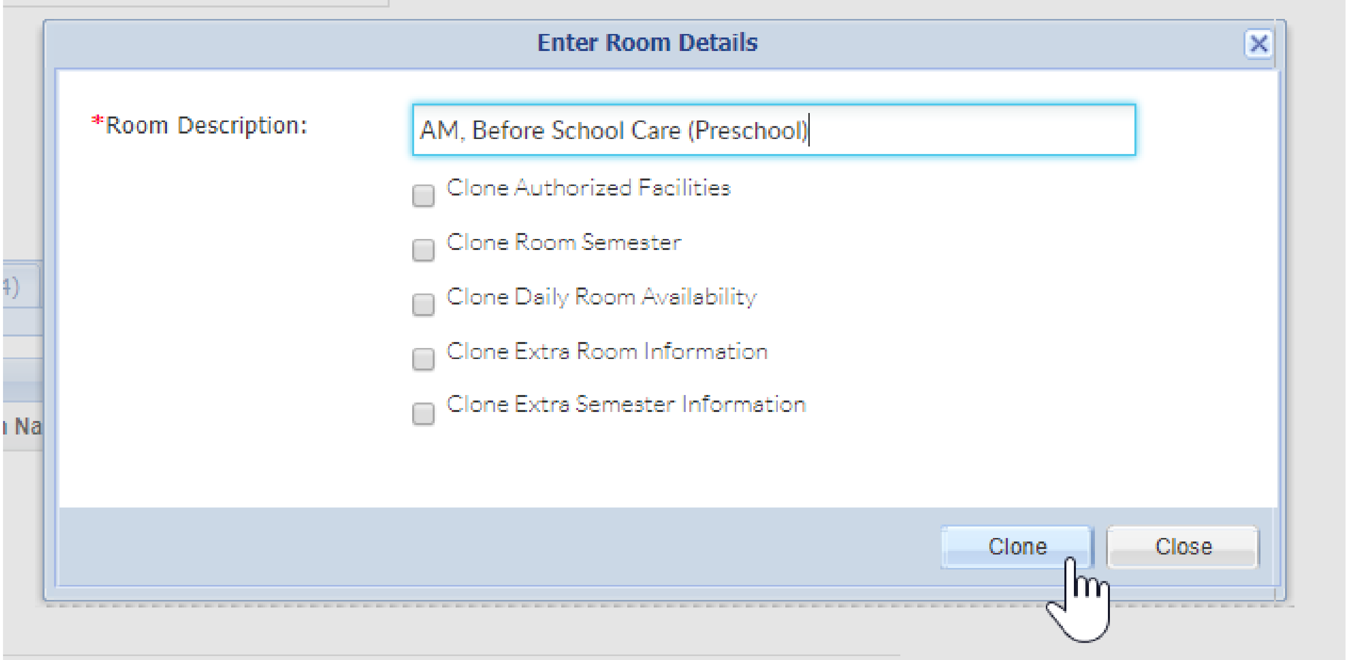


On the Enter Room Detail screen enter the below detail-

- Room description- enter the name of the room/program

Select from the below options-

1. Clone Authorized Facilities- select this checkbox if the new room/program should be associated to the same sites as the old room/program
2. Clone Room Semester- select this checkbox if the new room/program should be associated to the same semesters as the old room/program
3. Clone Daily Room Availability- select this checkbox if the new room/program should have the same calendar availabilty (only if the room is a calendar type room (Parent Managed)
4. Clone Extra Room Information- this is a legacy option and shouldnt be selected.
5. Clone Extra Semester Information- this is a legacy option and shouldnt be selected.


Enter Room Details

*Room Description: AM, Before School Care (Preschool)

☐ Clone Authorized Facilities
☐ Clone Room Semester
☐ Clone Daily Room Availability
☐ Clone Extra Room Information
☐ Clone Extra Semester Information

Once the Clone button is selected the system will refresh back to the Setup > Classroom page. If you would like to edit the room's detail (settings) select the room name. If you would like to add/edit the semester association select the view semester button under the new room's name.

- Setup > Room, Room/Program- (View Semester)

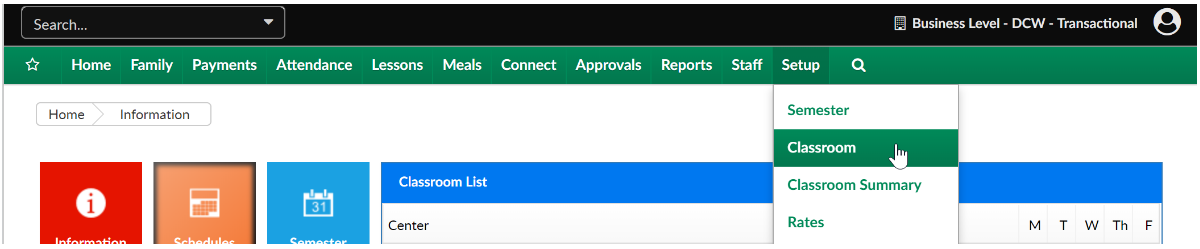
Creating a Reocurring Billing Room

Last Modified on 05/22/2018 11:20 am EDT

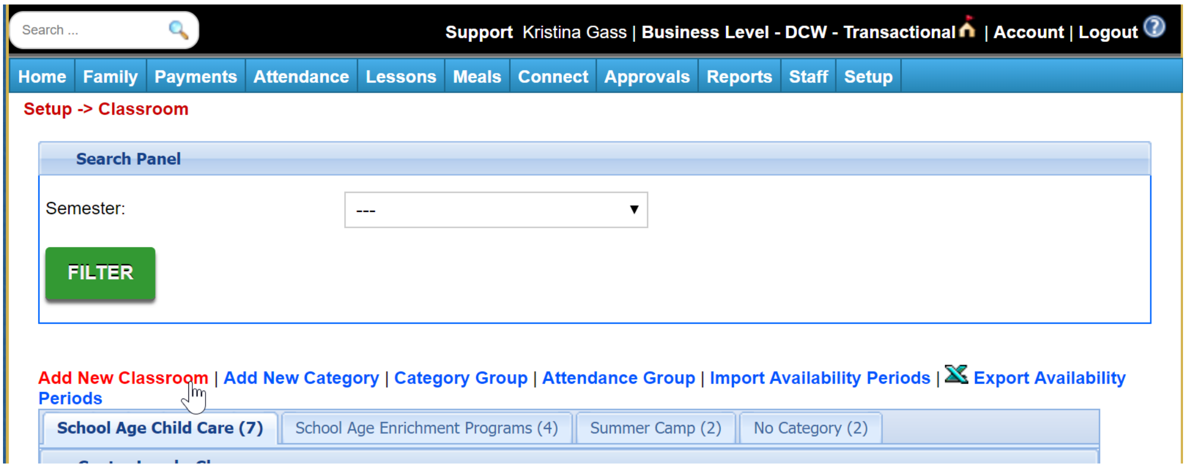
Reoccurring Billing Classrooms are programs or rooms that have a weekly or monthly reoccurring billing cycle.

Classrooms in the system are the names of programs but do not need to be actual physical locations. Using the Physical Room Name text box, administrators can combine multiple online classrooms into one physical location. If selections at the category level are setup but there are changes entered at the classroom level, the system will default to the selections made at the classroom level.

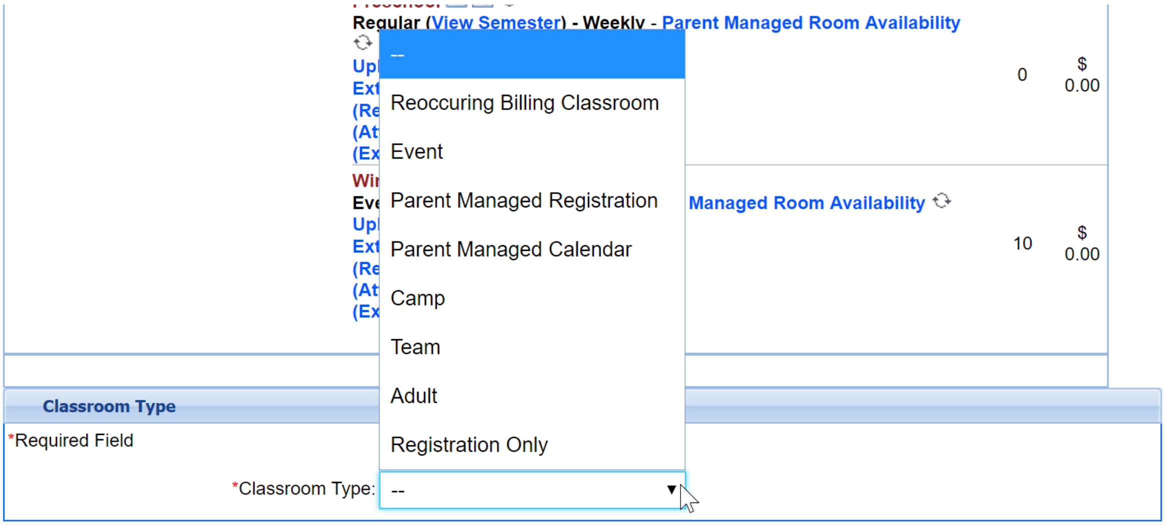
To create an Reoccurring Billing Classroom go to Setup > Room



Then select Add a New Classroom



From the drop down selection box choose the type of program that will be created-


Regular (View Semester) - Weekly - Parent Managed Room Availability

Classroom Type

*Required Field

*Classroom Type: --

For Reoccurring Billing Classrooms, the below fields are important-

- Room Name
- Classroom Category
- Online Description
- Capacity
- Add to wait list
- Billing Period- if transactional
- Allow Initial Schedule Selection
- Allow Initial Start Date
- Default Rate
- Default Days

Once the room has been setup, save- then click on the room name and authorize sites.

After sites have been authorized add the room to a semester by clicking the (View Semester) link under the room name.

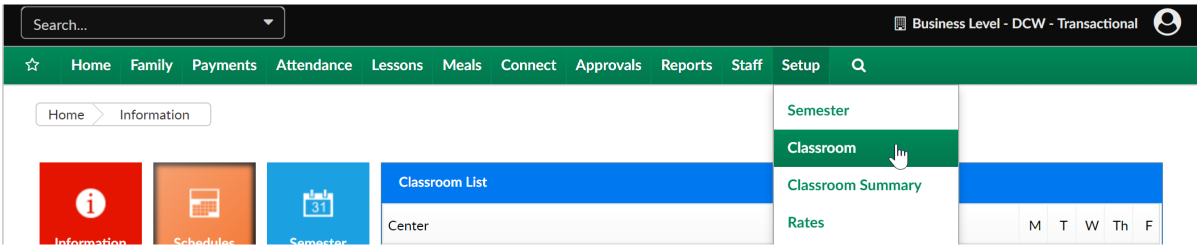
Click here to see how to authorize a room to a semester!

Creating Parent Managed Registration & Calendar Rooms

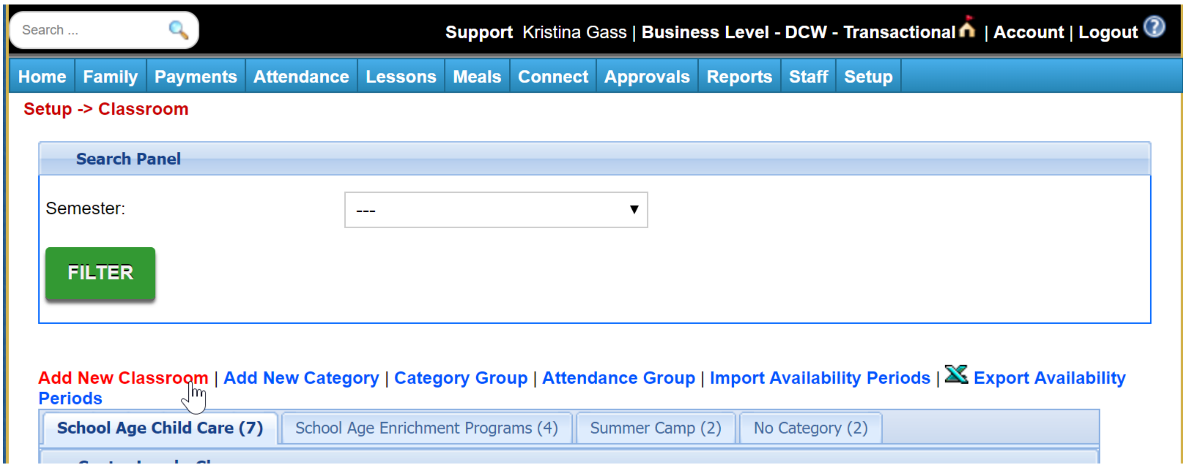
Last Modified on 06/17/2018 11:10 pm EDT

Parent managed classrooms allow parents to register children for a classroom and then select the days the child will attend the classroom from a calendar. This system is entirely managed by the parent, and does not have a forced or set schedule. Administrators select the days on a calendar a child can schedule for, but a child's schedule is selected completely by the parent.

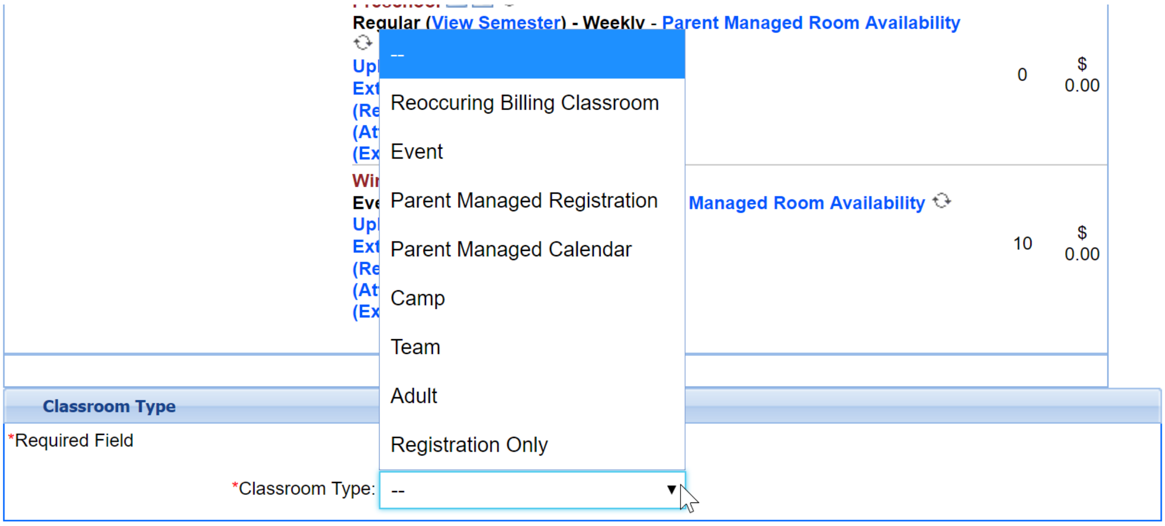
To create a Parent Managed Registration Room go to Setup > Room



Then select Add a New Classroom



From the drop down selection box choose the type of program that will be created-



*Classroom Type: --

For Parent Managed Registration, the below fields are important-

- Room Name
- Classroom Category
- Online Description
- Capacity
- Add to wait list
- Billing Period- if transactional
- Allow Initial Start Date- No
- Allow Calendar Selection- Yes
- Portal View Selection- Monthly/Combined

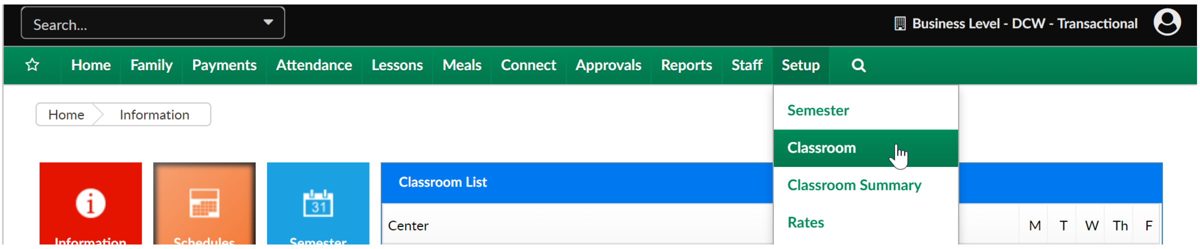
Once the room has been setup, save- then click on the Parent Managed Registration Room name and authorize sites. (If you are a single center site you will not need to authorize sites, the system will default to selecting your single site.)

After sites have been authorized add the Parent Managed Registration Room to a semester by clicking the (View Semester) link under the room name.

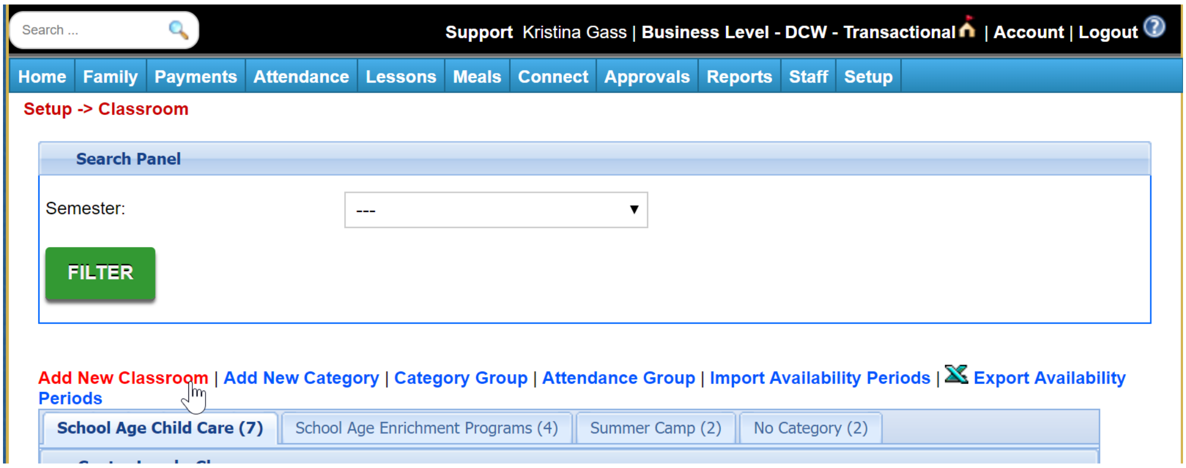
Click here to see how to authorize a room to a semester!

Then Calendar rooms will need to be created-

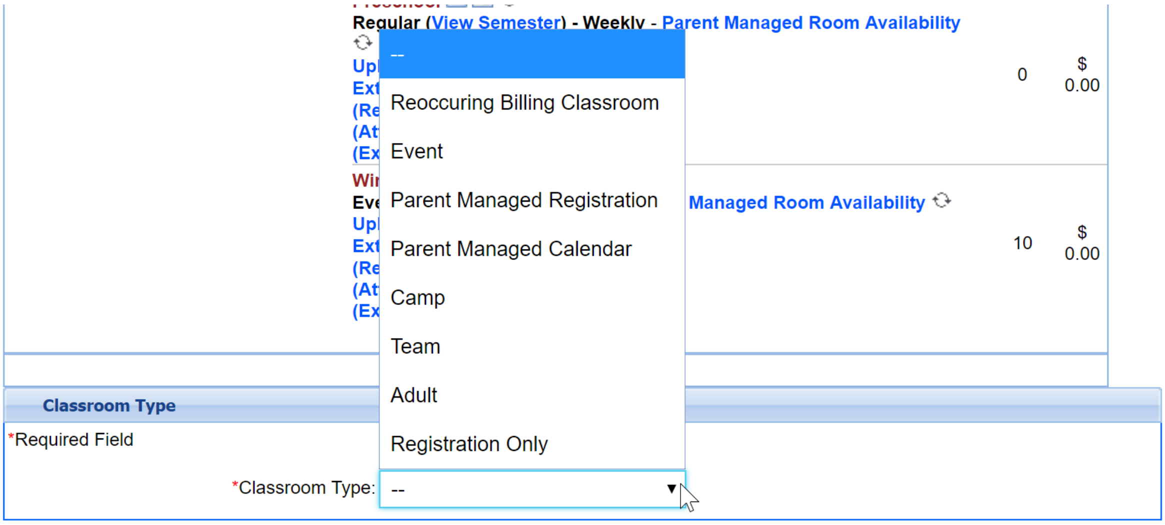
To create Parent Managed Calendar rooms go to Setup > Room



Then select Add a New Classroom



From the drop down selection box choose the type of program that will be created-



For Parent Managed Calendars, the below fields are important-

- Room Name
- Classroom Category
- Online Description
- Capacity
- Add to wait list

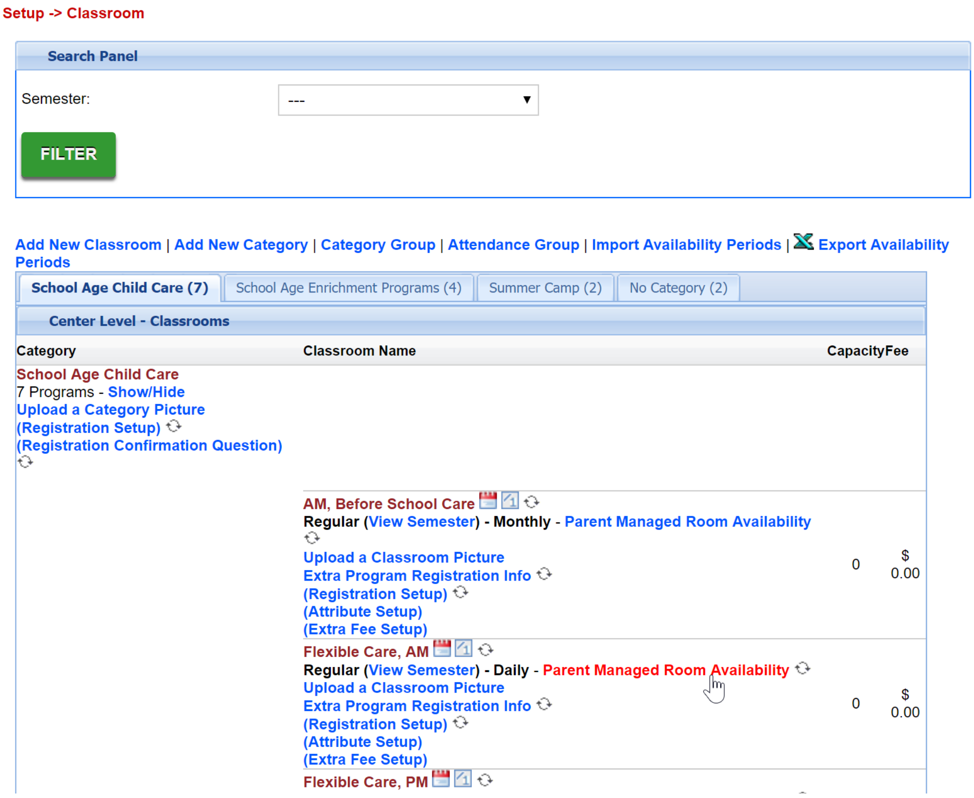
- Billing Period- if transactional
- Default Rate
- Allow Initial Start Date- No
- Allow Calendar Selection- Yes
- Portal View Selection- Monthly/Combined

Once the room has been setup, save- then click on the Parent Managed Calendar Room name and authorize sites.

After sites have been authorized add the Parent Managed Calendar Room to a semester by clicking the (View Semester) link under the room name.

Click here to see how to authorize a room to a semester!

Once the Registration and Calendar rooms have been created days for selection must be added to the parent managed calendar room. To add days select the Parent Managed Availability link next to the calendar room name. Once availability has been added, it can be cloned to other parent managed calendars by selecting the circle icon next to the Parent Managed Availability link.



Setup -> Classroom

Search Panel

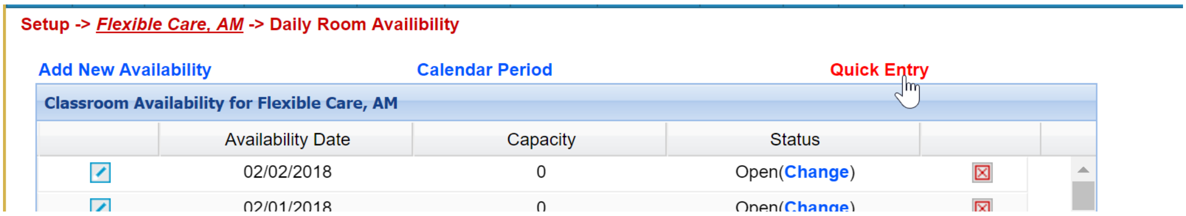
Semester: ---

Add New Classroom | Add New Category | Category Group | Attendance Group | Import Availability Periods | Export Availability Periods

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Age Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, AM Regular (View Semester) - Daily - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, PM		

Select Quick Entry from the top menu, and check off the days for each month that parents should be able to select for each calendar room.



Setup -> *Flexible Care, AM* -> Daily Room Availibility

Add New Availability | Calendar Period | Quick Entry

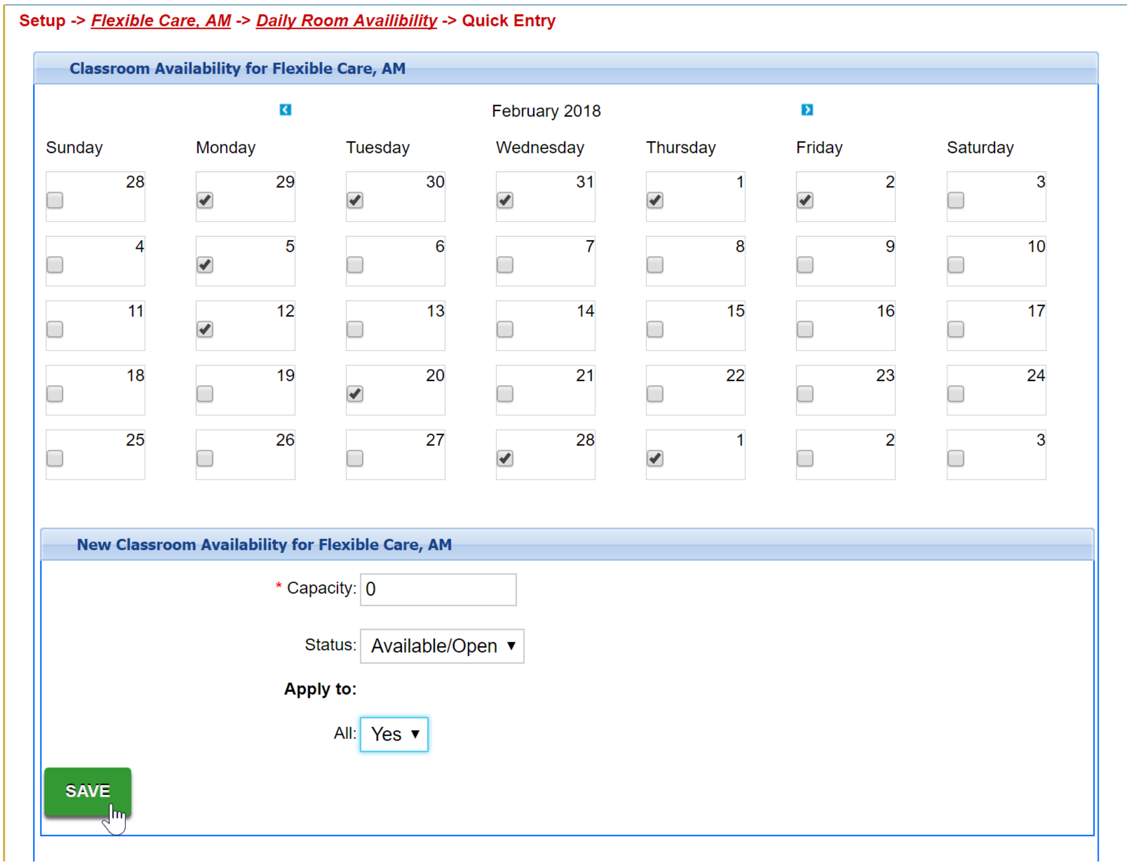
Classroom Availability for Flexible Care, AM

	Availability Date	Capacity	Status	
	02/02/2018	0	Open(Change)	☒
	02/01/2018	0	Open(Change)	☒

Once days have been selected, enter-

- Capacity - the number of kids that can register for each day (0 means unlimited)\
- Status- is the day open or closed
- Apply to All- must be set to Yes

Then select Save.



Setup -> *Flexible Care, AM* -> *Daily Room Availibility* -> Quick Entry

Classroom Availability for Flexible Care, AM

February 2018

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28 ☐	29 ☑	30 ☑	31 ☑	1 ☑	2 ☑	3 ☐
4 ☐	5 ☑	6 ☐	7 ☐	8 ☐	9 ☐	10 ☐
11 ☐	12 ☑	13 ☐	14 ☐	15 ☐	16 ☐	17 ☐
18 ☐	19 ☐	20 ☑	21 ☐	22 ☐	23 ☐	24 ☐
25 ☐	26 ☐	27 ☐	28 ☑	1 ☑	2 ☐	3 ☐

New Classroom Availability for Flexible Care, AM

* Capacity: 0

Status: Available/Open

Apply to:

All: Yes

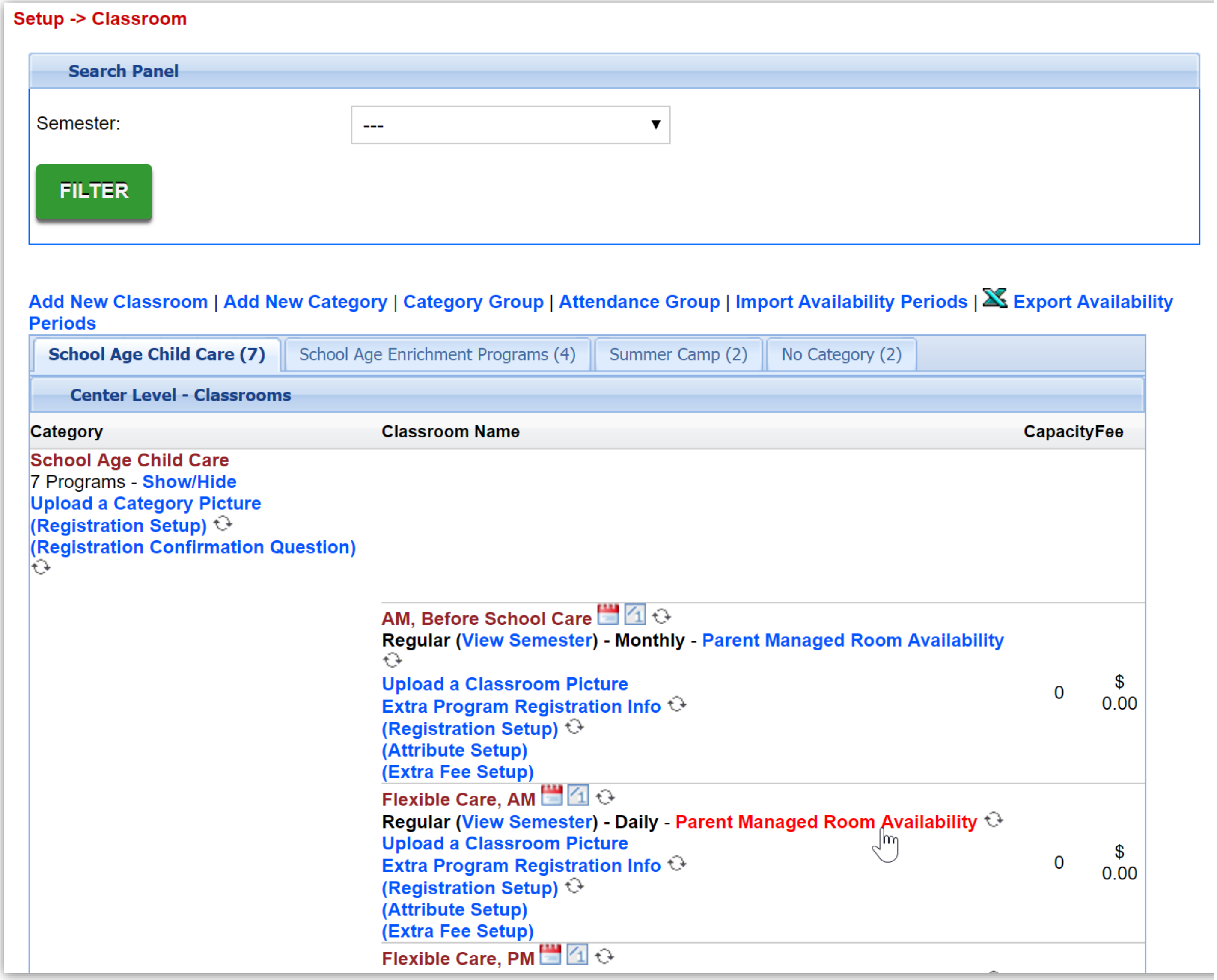
Tips: If days are not displaying to parents on the schedule tab of the parent portal-

- Be sure the calendar registration dates on the semester level have been set.
- Be sure to check that Allow Select has been marked as YES on both the Calendar and Registration rooms.
- Check the Family Managed Calendar - Show Combined: setting on the Setup > System Config, Registration screen is set to yes.

Parent Managed Room Availability

Last Modified on 03/12/2018 2:59 pm EDT

Once the Registration and Calendar rooms have been created days for selection must be added to the parent managed calendar room. To add days select the Parent Managed Availability link next to the calendar room name. Once availability has been added, it can be cloned to other parent managed calendars by selecting the circle icon next to the Parent Managed Availability link.



Setup -> Classroom

Search Panel

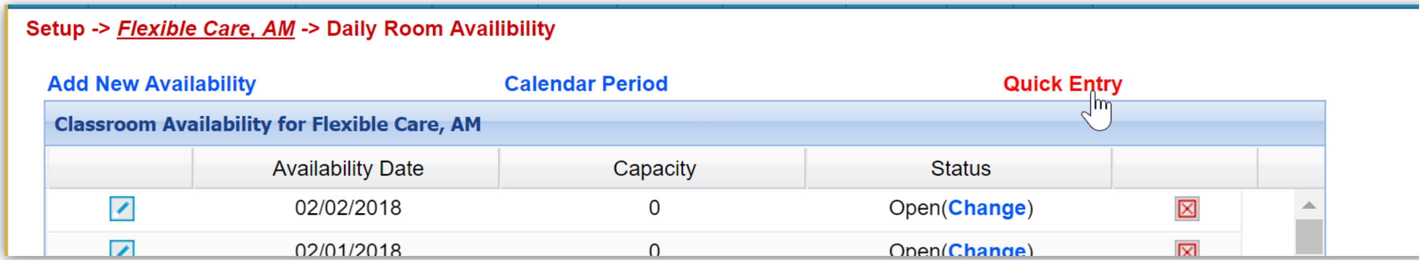
Semester: ---

Add New Classroom | Add New Category | Category Group | Attendance Group | Import Availability Periods | Export Availability Periods

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Age Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, AM Regular (View Semester) - Daily - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, PM		

Select Quick Entry from the top menu, and check off the days for each month that parents should be able to select for each calendar room.



Setup -> *Flexible Care, AM* -> Daily Room Availibility

Add New Availability   Calendar Period   Quick Entry

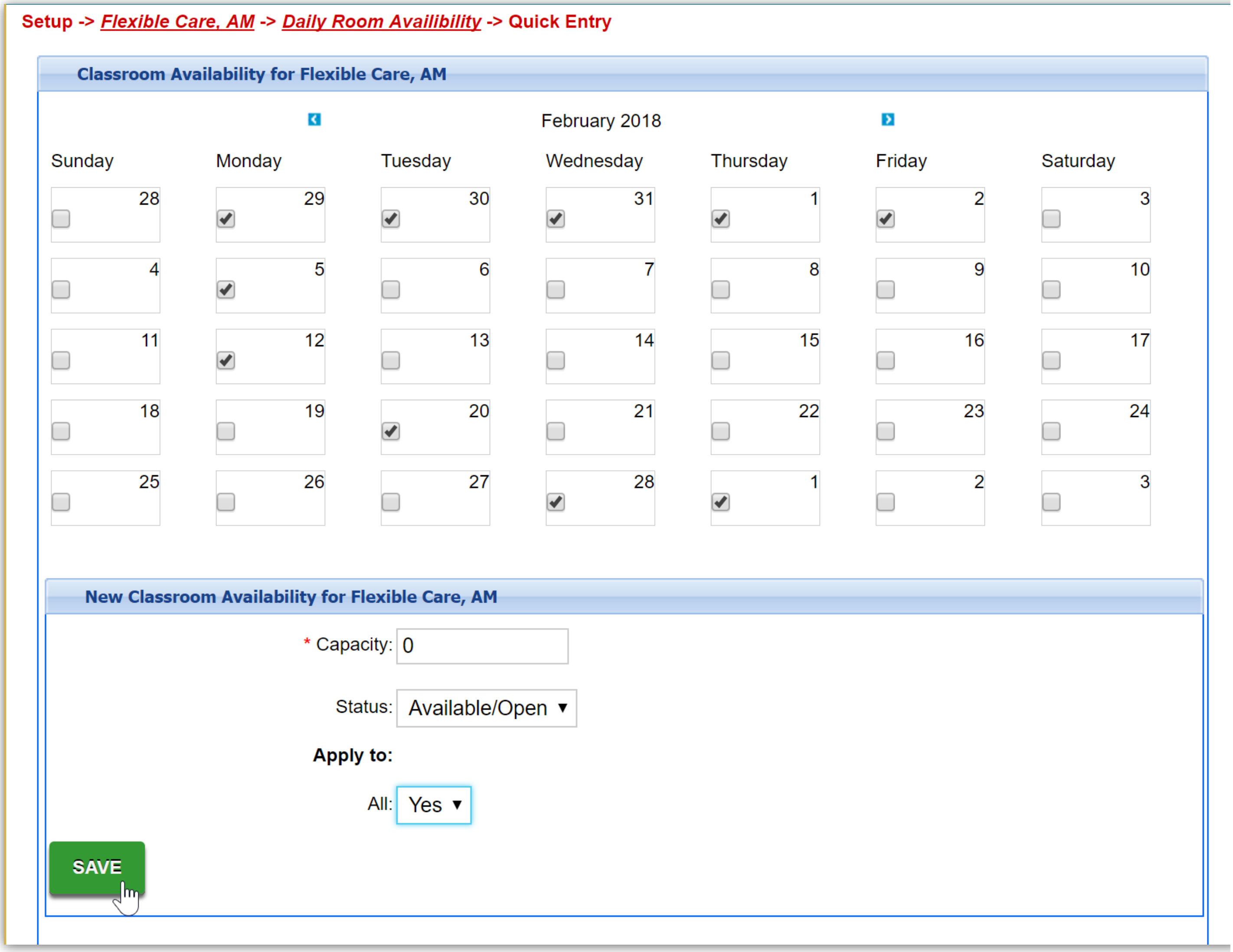
Classroom Availability for Flexible Care, AM

	Availability Date	Capacity	Status	
✎	02/02/2018	0	Open(Change)	☒
✎	02/01/2018	0	Open(Change)	☒

Once days have been selected, enter-

- Capacity - the number of kids that can register for each day (0 means unlimited)\
- Status- is the day open or closed
- Apply to All- must be set to Yes

Then select Save.



Setup -> *Flexible Care, AM* -> *Daily Room Availibility* -> Quick Entry

Classroom Availability for Flexible Care, AM

February 2018

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28 ☐	29 ☑	30 ☑	31 ☑	1 ☑	2 ☑	3 ☐
4 ☐	5 ☑	6 ☐	7 ☐	8 ☐	9 ☐	10 ☐
11 ☐	12 ☑	13 ☐	14 ☐	15 ☐	16 ☐	17 ☐
18 ☐	19 ☐	20 ☑	21 ☐	22 ☐	23 ☐	24 ☐
25 ☐	26 ☐	27 ☐	28 ☑	1 ☑	2 ☐	3 ☐

New Classroom Availability for Flexible Care, AM

* Capacity: 0

Status: Available/Open

Apply to:

All: Yes

Tips: If days are not displaying to parents on the schedule tab of the parent portal-

- Be sure the calendar registration dates on the semester level have been set.
- Be sure to check that Allow Select has been marked as YES on both the Calendar and Registration rooms.
- Check the Family Managed Calendar - Show Combined: setting on the Setup > System Config, Registration screen is set to yes.

Creating Camp Rooms

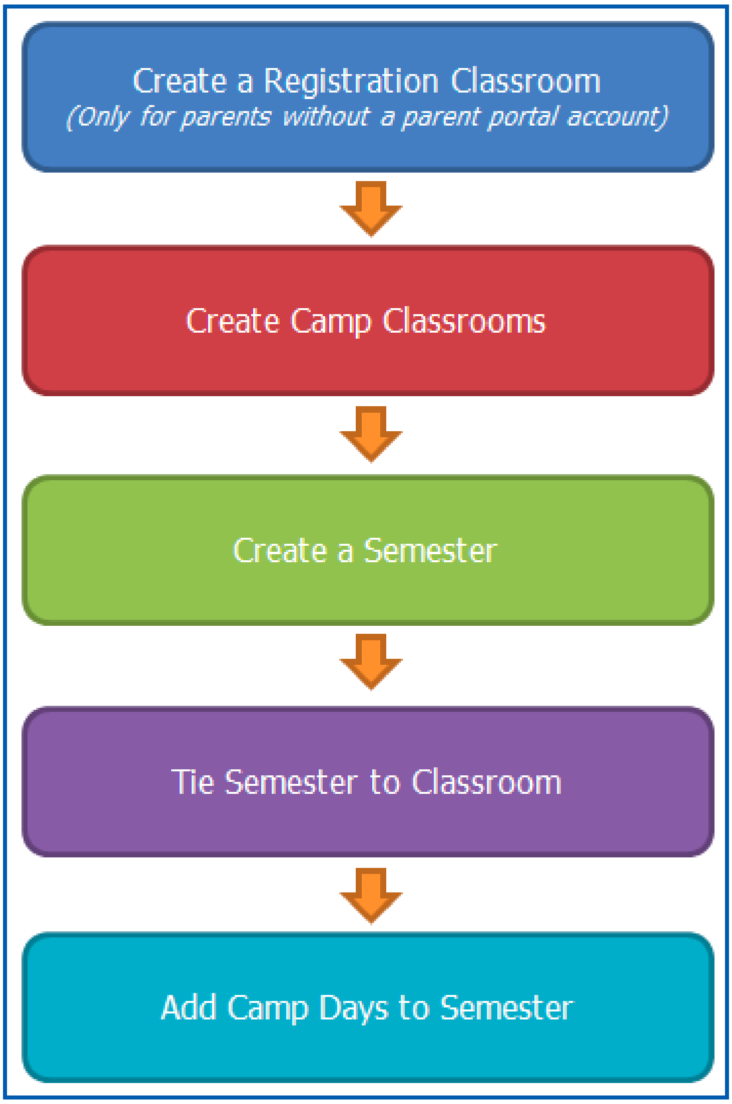
Last Modified on 06/17/2018 11:19 pm EDT

Camps are similar to events but parents select days they want their child to attend on the Connect Portal during registration.

The camp days can be setup with individual costs; depending on the activity for the camp.

Parents must already have an account in the Connect Portal to be able to select camp days. New registrations are not able to select camp days during their initial registration.

Creating a camp requires an administrator to complete multiple steps together.



1. Administrators must setup a registration classroom in the system. This is only required to have parents who do not currently have a the Connect Portal account access to camps.

2. Administrators must setup a classroom. When setting up the classroom, select Camp in the Classroom Type drop down list (go to setup > room, select the actions button, then select Add New Classroom) and Event in the Registration type drop down list in the Additional Online Registration Information section. The billing period for Camps must also be selected as None.

3. Administrators must setup a semester. How to Create a Semester

4. Administrators must associate the semester to the classroom. How to Tie Classrooms to Semesters

5. Administrators must setup the camp or field trip days for the camp.

Creating Registration Only Rooms

Last Modified on 10/19/2017 11:00 am EDT

Registration only rooms allow parents to generally register for a center without registering for a specific room/program.

Room/Program Fields

Last Modified on 12/26/2018 12:52 pm EST

When creating a room/program there are several options that display. Below provides a brief description of each field and what will be impacted when configured.

Please Note: ** indicates required fields.

Classroom Information

- **Room Name - Enter the name of the program being setup, this can be changed in the future
- Room Category - Select a Category from the drop-down. Choosing a Category allow administrators to pull detail by category and this option will impact where the program displays for parents during registration
- Attendance Group - Choose an attendance group from the drop-down list. Attendance groups allow centers to combine multiple rooms together for labor planning and staff scheduling
- Online Description - The information entered in this field will display during the registration process. This information can include program details, rates, images, etc.
- **Operating Capacity - Enter the number of students allowed to register into this room. This can also be important for some of the capacity reports (Reports > Program)
    - **Please Note**: A Capacity of 0 means registration is unlimited
- Licensed Capacity - the capacity the room is licensed for
- Send Email When Room Reaches Capacity
    - Yes - When the room reached capacity, an email will be sent to the contact indicated
        - To setup the contact navigate to Setup>Classroom, View Semester , which is located under the room/program name), enter the formation in the Contact Email field
    - No - An email will not be sent when capacity is met
- **Registration Fee - Enter the cost to register into the program. **Please Note**: This

should only be used if the Semester Cost is setup at the Room/Program level or Semester Family & Room/Program

- Active
  - Yes - Registration will be enabled for this classroom
  - No - Registration will not be enabled for this classroom
  - Pending -
- Show in Mobile Apps
  - Yes
  - No
- Primary Classroom - **Suggestion**: Leave as default
  - Yes - Default - The room/program will be a primary classroom for a student's third party contract
  - No - The room/program will not be a primary classroom for a student's third party contract
- Physical Room Name - Enter the physical location name, if applicable. This is used for associating multiple classrooms online to one physical location in a center
- Default Revenue Type - If a business is using coupons or discounts, the default revenue is used to associate the coupon or discount to a classroom or category. The default revenue at a category or classroom must match the default revenue type associated to a coupon
  - By default, if Default Revenue is selected, the category or classroom will be associated to the Revenue Type of Tuition, setup in the Valid Value section
- Deferred Revenue Type - Deferred revenue allows a "Type - Fee Valid Value" associated to a classroom to be spread out across a student's classroom assignment, based on the start and end date of the child's classroom assignment. For a classroom to have deferrable revenue, the "Type - Fee Valid Value" must have Yes selected in the Deferrable drop-down list.
  - Deferrable revenue is only for registration fees.
- Allow Discounts - this applies to family/student discounts
  - Yes - Discounts can be applied to the room/program
  - No - The room is not eligible for discounts
- Tuition Based Program - This option will designate the classroom as tuition based

and allow the room to be eligible for tuition based discounts
    - Yes - On Schedule - this room's tuition is based on the student's schedule
    - Yes - On Attend - this room's tuition is based on attendance
    - No - This classroom is not tuition based
- Student/Teacher Ratio - Enter the desired student to teacher ratio for the room
- Required Student/Teacher Ratio - Enter the required ratio of students to teachers for the room
- Invoice Hourly Immediately - **Suggestion**: Leave as default, additional billing code is required for this to work
    - Yes - Immediately invoice parents for the hours the student attended
    - No - Default - Amount will be billed during regular billing process
- Tax Credit Eligible - **Suggestion**: Leave as default, additional billing code is required for this to work
    - Yes - Parents are eligible for a tax credit for enrolling their child into the classroom
    - No - Default - Parents are not eligible for a tax credit for enrolling their child into the classroom
- FTE Eligible (Full Time Equivalency)
    - Yes - The center is recording FTEs and the classroom is eligible for FTE calculation
    - No - The center is not tracking FTE detail
- Accounting Code - Enter the accounting code or identification number. This is used to reference the classroom in the GL Builder
- Include on Year End Tax
    - Yes - The classroom should be displayed on a family's year-end tax statement
    - No - The classroom should not be displayed on a family's year-end tax statement
- Age Range (In Months) - The age of students that can register for a program
    - **Please Note**: This is based off the student's current age, not the age the child will be when the program begins

- Age Deadline Date - if the student must be a certain age by a certain date, enter the date here
- Square Footage - The square footage of the classroom
- Sequence # - The order the room/programs should display on the registration page of the parent portal
- # Hours Max For Half Day FTE - The maximum number of hours for the classroom to be associated to a half day FTE unit, if applicable
- Daily Sheet - If Daily InSites will be provided to parents, select the Daily Sheet template that should be used
- Facility - Select the location within the facility/center, if applicable
- Allow Room Change Request
    - Yes - Parents/Guardians will be able to submit a room change request on the parent portal under the schedule tab
    - No - Parents/Guardians will not be able to submit a room change request
- Allow Schedule Cancel Request
    - Yes - Parents/Guardians will be able to submit a schedule cancel request on the parent portal under the schedule tab
    - No - Parents/Guardians will not be able to submit a schedule cancel request
- Show Only on Staff Scheduling
    - Yes - The room is only being used to schedule staff and will not count towards FTE/registration
    - No - The room is a regular program/room being used for students

CACFP

- Room Meal Times

Attendance Information

- Collect Attendance
    - Yes - Allow attendance to be recorded for the classroom
    - No - Do not allow attendance to be recorded for the classroom
- Split Attendance - **Suggestion**: Leave as default, additional billing code is required

for this to work
    - No - Default - The site has not been setup for split attendance working with subsides
    - Yes - Attendance in the classroom will be split between two classrooms
        - **Please Note**: This is only used for double subsidy recording
- Default Attendance In/Out
    - No - No default attendance method selected for the classroom
    - Room Defaults - The default attendance method selected as the Default Check In and Default Check Out times
        - If Room Default was selected, enter the default check in/out times in the Default Check In and Default Check Out drop-down lists. This is based off a 24-hour clock
    - Schedule Defaults - The attendance defaults to the student's expected arrival and departure times for the classroom
    - Center Hours Default - The attendance defaults to the hours the center is open
- Default Check In/Default Check Out - Only enter times if Default Attendance is set to "Room Defaults"
- Unscheduled Attendance Fee - Enter a fee parents will be charged for each occurrence of an unscheduled attendance
- Unscheduled Revenue Type - If there is a Type - Fee Valid Value that will be associated to the unscheduled attendance in the classroom, select the Type - Fee Valid Value in the Unscheduled Revenue Type drop-down list

Additional Online Registration Information

- Registration Type
    - Regular - Reoccurring billing
    - Event - Only use if the room is charging a one-time fee
    - Team - For use with RecCare Works
    - Adult Program
    - Registration Account - No billing occurs. Allows users to register into a category of programs

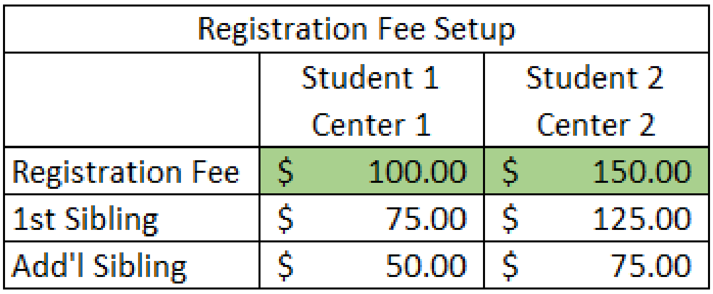
- Send Email on All Registrations
    - Use Default
    - Yes - An email will send for every registration into the classroom
    - No - An email will not be sent when students register
- Finishing Text - Enter the message that will display to the parents after completing the registration
- Place into Waiting List
    - Yes - All registrations will require approval
    - No - Portal registrations from existing families will automatically be approved
- Add to Waiting List After Reaching Capacity
    - Yes - Once capacity is reached for a program, the Enroll button will change to Add to Wait List
    - No - Once capacity is reached for a program, the room will no longer accept registrations
- Allow - select what time the classroom will be available
    - AM
    - PM
    - AM/PM
    - Full Day
    - Early Release
    - Holiday
- Number of Credits - Enter the number of credits earned upon completion of the program, if applicable
- Pay First before accepting registration
    - Yes - Parents will be required to pay the program registration fee before completing registration, unless a check unlock code is provided
    - No - Parents will be able to complete registration without paying, the fee will be allocated to the family's financial record
- Full Registration (Online)
    - Yes - Registration for the room will display for new and existing families
    - Connect Portal Only - The registration will only display to existing families

    through the parent portal

- Registration Online
    - Open - Registration is open for students to register
    - Closed - Do not open the classroom for registration
- Registration View - Leave set to Wizard
- Allow Registration Rate Selection
    - Yes - Allows parents to select a rate from a category of rates. Rate Categories must be added below to allow for selection. Rate Categories can be setup in Setup>Rates
    - No - Children will be assigned Program/Room assignments with the default rate
- Allow Registration Across Centers
    - Yes - All families will be able to register for the program
    - No - Only families at the program's location will be able to register
- Allow Initial Schedule Selection
    - Yes - During registration, parents will be able to select which days their student will attend
    - No - Parents will not be able to select the days their student will attend during registration
        - **Please Note**: Add the days the program is running in the days field below
- Allow Initial Start Date
    - Yes - Parents will be able to select a requested start date for the student's program/room assignment
    - No - Parents will not be able to select a start date for the student's program/room assignment. The start date will be based off the semester settings found under (View Semester) or the default settings in Setup>Semester
- Minimum Days Selected - If parents are selecting the Initial Schedule, enter the minimum number of days they can select
- Maximum Days Selected - If parents are selecting the Initial Schedule, enter the maximum number of days they can select

- Start Hour - Program start time
- Stop Hour - Program stop time
- Billing Period - Only set if billing is transactional and the room is a reoccurring billing room
    - Daily
    - Weekly
    - Monthly
    - Yearly
    - None - see below
- If "None" Billing Period (Use Default if all days selected) - Leave as default: No
- # Months Upfront - If a site wants to pre-bill for the default rate, enter the number of periods up front
    - Examples
        - If a rate is set to $20.00 per week and 1 is entered, the parent would need to pay $20.00 up front
        - If a rate is set to a flat $300.00 and 2 is entered the parent would have to pay $600.00 before completing registration
- Default Rate - The default amount that will be charged. To setup default rates, navigate to Setup > Rates
- Rate Category - choose a rate category from the drop-down, if applicable
- Default Days - Place a check mark under the days for the program schedule
    - AM
    - PM
    - AM/PM
    - Full Day
- Display Course
    - Yes - Display the course number on registration
    - No - Hide the course number on registration
- Display Age Range
    - Yes - Display the age range on registration
    - No - Hide the age range on registration
- Display Min Enrollment

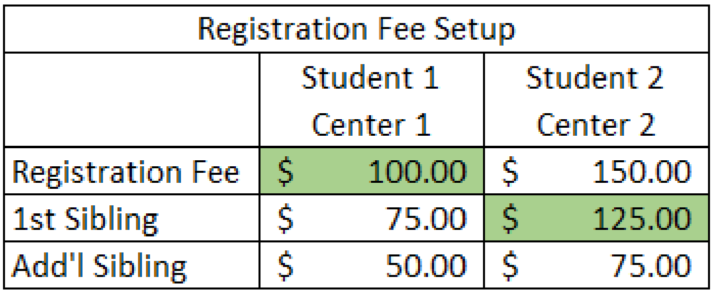
    - Yes - Display the minimum student enrollment on registration
    - No - Hide the minimum student enrollment on registration
- Display Max Enrollment
    - Yes - Display the maximum student enrollment on registration
    - No - Hide the maximum student enrollment on registration
- Display Current Enrollment
    - Yes - Display the current enrollment on registration
    - No - Hide current enrollment on registration
- Display Program Dates
    - Yes - Display the dates of the program on the registration page
    - No - Do not display the program dates
- Registration Fee Label - Enter an updated name for the registration fee, this will display on registration
- Registration Button Label - Enter an updated name for the registration button, this will display on registration
- Display Waiver
    - No - The waiver will not be displayed
    - Yes - The waiver will display
- Waiver - Enter the waiver text to display
- Fixed Plan for all days?
    - Yes - The schedule will be the same for all days
    - No - if plan options will be used
- Allow Sibling Registration fee per center? (Applies only for Room/Program Setup and Semester Family & Room/Program)
    - Yes - all students must pay the first student Registration Fee. See chart below for example; the highlighted fees will be charged:



Registration Fee Setup		
	Student 1 Center 1	Student 2 Center 2
Registration Fee	$ 100.00	$ 150.00
1st Sibling	$ 75.00	$ 125.00
Add'l Sibling	$ 50.00	$ 75.00

    - No - the first student is charged the Registration Fee, the second student is charged the 1st Sibling Fee for their attending center, and additional students are charged the Additional Sibling rate for their attending center. Please see the Classroom Information section above or View Semester for assistance setting up fees

    - Example: Student 1 attends Pine Elementary PM Latchkey and Student 2 attends Oak Elementary PM Latchkey. Instead of charging both students the Registration Fee, the school/center allows the second student to be charged the Sibling Fee for their attending center. See chart below for an example of a fee setup:



Registration Fee Setup		
	Student 1 Center 1	Student 2 Center 2
Registration Fee	$ 100.00	$ 150.00
1st Sibling	$ 75.00	$ 125.00
Add'l Sibling	$ 50.00	$ 75.00

Taxes

- Registration Taxable
  - Yes - the registration fee is taxable. To set the tax up, click here
  - No - the registration fee is not taxable
- Tuition Taxable
  - Yes - tuition is taxable. To set the tax up, click here
  - No - tuition is not taxable

Parent Managed (Portal) - Options are only for Parent Managed Calendar or Registration Rooms

- Allow Calendar Selection
  - Yes - Allow calendar selection
  - No - Parents are unable to choose days from calendar
- Calendar Cutoff Day - Enter the day the room will close off for selection
- Calendar Cutoff Hour - Select the hour the room will close off for selection on the day selected in the Calendar Cutoff Day
- Calendar Cutoff Based on Billing Period - Select No

- Portal View Selection - Select Monthly/Combined
- Bill As - Select the time frame the class is operating
- Portal Read Only - Select No (Allow Selection)
- Use 5 Day rate as max amount - Select No
- Use AM/PM Rate if applicable - Select No
- Combine Capacity With Program - Select Do Not Share Operating Capacity

Registration Fee Examples

Last Modified on 12/19/2018 11:52 am EST

The following registration fees will apply when using the Semester Cost At Room/Program and Semester Family & Room/Program when setting up the semester.

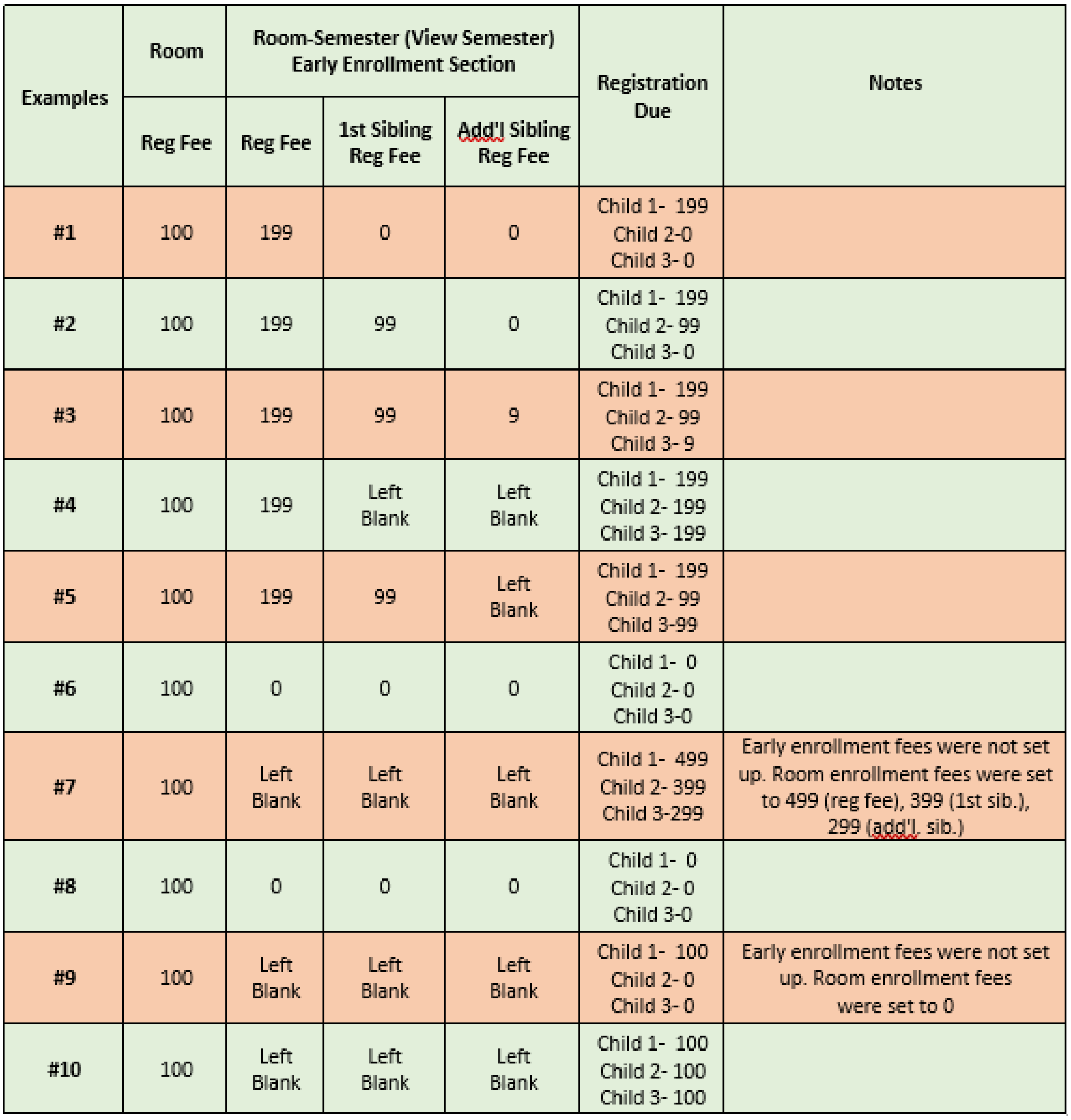
Registration During Regular Enrollment Period

If family registers during the regular enrollment period, please see examples below for the first student, 1st sibling, and any additional siblings.

Examples	Room	Room-Semester (View Semester) Enrollment Section			Registration Due
	Reg Fee	Reg Fee	1st Sibling Reg Fee	Additional Sibling Reg Fee	
#1	100	499	0	0	Child 1: 499 Child 2: 0 Child 3: 0
#2	100	499	399	0	Child 1: 499 Child 2: 399 Child 3: 0
#3	100	499	399	299	Child 1: 499 Child 2: 399 Child 3: 299
#4	100	499	Left Blank	Left Blank	Child 1: 499 Child 2: 499 Child 3: 499
#5	100	499	399	Left Blank	Child 1: 499 Child 2: 399 Child 3: 399
#6	100	0	0	0	Child 1: 100 Child 2: 0 Child 3: 0
#7	100	0	Left Blank	Left Blank	Child 1: 100 Child 2: 100 Child 3: 100

Registration During Early Enrollment Period

If family registers during the early enrollment period, please see examples below for the first student, 1st sibling, and any additional siblings.



Examples	Room	Room-Semester (View Semester) Early Enrollment Section			Registration Due	Notes
	Reg Fee	Reg Fee	1st Sibling Reg Fee	Add'l Sibling Reg Fee		
#1	100	199	0	0	Child 1- 199 Child 2-0 Child 3- 0	
#2	100	199	99	0	Child 1- 199 Child 2- 99 Child 3- 0	
#3	100	199	99	9	Child 1- 199 Child 2- 99 Child 3- 9	
#4	100	199	Left Blank	Left Blank	Child 1- 199 Child 2- 199 Child 3- 199	
#5	100	199	99	Left Blank	Child 1- 199 Child 2- 99 Child 3-99	
#6	100	0	0	0	Child 1- 0 Child 2- 0 Child 3-0	
#7	100	Left Blank	Left Blank	Left Blank	Child 1- 499 Child 2- 399 Child 3-299	Early enrollment fees were not set up. Room enrollment fees were set to 499 (reg fee), 399 (1st sib.), 299 (add'l. sib.)
#8	100	0	0	0	Child 1- 0 Child 2- 0 Child 3-0	
#9	100	Left Blank	Left Blank	Left Blank	Child 1- 100 Child 2- 0 Child 3- 0	Early enrollment fees were not set up. Room enrollment fees were set to 0
#10	100	Left Blank	Left Blank	Left Blank	Child 1- 100 Child 2- 100 Child 3- 100	

Creating or Editing a Category

Last Modified on 01/04/2019 11:12 am EST

Categories are ways to organize similar classrooms, programs, or events. Using categories previously setup, make creating classrooms faster. When parents are registering from the Parent Portal, they must select a category before selecting the classroom. Categories can also be used to create reports for multiple classrooms.

Categories can also be grouped together into Category Groups. Rooms can be changed between categories. Parents will select a category group (if setup), then a category, then a room on registration.

To add a new category, select the Actions button, then select New Category-

1. Click the Actions drop-down
2. Select Add New Category
3. Complete the following options
4. Classroom Category - enter the name of the category
    - Classroom Category – enter the category name here. Examples:
        - Early Childhood
        - Infants
        - Before and After School Care
5. Student/Teacher Ratio – the ratio at the category level if all rooms built under the category will have the same ratio
6. GL Code – add the account number associated to the category level if using room category as a segment in the GL builder
7. Show All on Attendance – if the category has variable scheduling for classrooms within the category and the classrooms will be capturing unscheduled days
    - Yes
    - No
8. # Hours Max for Half Day FTE – the maximum number of hours for a classroom to be associated to half day FTE
9. Default Revenue Type - helps track revenue generated by categories
    - Default Revenue
    - Activity Fee

    - Late Fee
    - Registration
    - Tuition
10. Default Reporting Category – select only if every student in the category will be assigned to a reporting group
    - Reporting Group
    - Employee
    - Regular Family
11. Daily Sheet – if a specific daily sheet should be associated with all classrooms under a category, select a daily sheet from the drop down menu
12. Allow Room Change Request – this has to be set on the category level and room level
    - Yes – if parents are able to submit schedule change requests
    - No – if parents are not able to submit schedule change requests
13. Allow Portal Parent Managed Day Removal - if the System Config setting for Allow Days to be Removed is set to Yes, then this setting will determine if the option is available for this room category
    - Yes - parents are able to remove previously scheduled days from a Parent Managed Calendar
    - No - parents are not able to remove scheduled days
14. Show Only on Scheduling
    - Yes – this category of programs will only be used for staff scheduling, students will not be scheduled in this room
    - No – this category is not only used for staff scheduling
15. Restricted Rates – if there are specific rates that should only be assigned to one category, select this to display only assigned rates
16. Description – add a summary of the category of programs - this might include rates, hours, links to documents, site information etc. Parents will see this detail before they can select specific programs
17. Additional Online Registration Information
    - Registration Type

        - Normal – if programs are reoccurring or event types
        - Event – if programs are event types only
        - Store – if programs are store or item type rooms
        - Volunteer – if programs are volunteer type rooms
        - Adult Program – if programs are adult type rooms
        - Team – if programs are Team type rooms
        - Registration Only – if programs are registration only type rooms

18. Auto Approve New Registration
    - No – new registrations will require approval from the approval>registration area
    - Yes – new registrations will not require approval, any registration will automatically be approved
19. Single Page Registration
    - Yes – rooms will show as available on the new registration page for a center
    - No – rooms will not show as available on the new registration page for a center
20. Registration View
    - Catalog – displays blocks of program information
    - Table – information is displayed in a table format. To use this option, "Table – All Information" for Registration Look must be selected
21. Registration Sort
    - Catalog – options will be sorted by Program first, then Center/Facility
    - Center/Facility – options will be sorted by Center/Facility first, then select the Program
22. Registration Look
    - Table – All Information – must be used with "Table" under Registration View for this to work
    - Table with No Capacity – must be used with "Table" under Registration View for this to work. This removes the Capacity column
    - Program Catalog View – must use with "Catalog" under Registration View
23. Registration Unlock Code – enter a code parents would use to access

room/programs under this category

24. Allow View Selection
    - Yes – category will display on the new registration page and portal registration
    - No – category will not display on the new registration page and portal registration
    - Connect Portal Only – category will only display for registration through the parent portal
25. Allow Center Selection Only
    - Yes
    - No
26. Opt Out of unlock code for checks
    - Yes – unlock codes cannot be used, parents must pay up front
    - No – unlock codes can be used on the cart page of registration
27. Use Time Constraints
    - No
    - Yes
28. Check Unlock Code – enter a phrase that parents can use to bypass paying up front
29. Capture Credit Card
    - No
    - Yes – the system will save the parent's credit card (the credit card will not be automatically added to auto-pay, but parents will be able to sign up for auto-pay if the parent logs into the parent portal)
30. Send Admin Email on Portal Registration
    - No
    - Yes
31. Send Email on All Registrations
    - No
    - Yes
32. Allow Duplicates
    - No – parents will not be able to enroll their student in programs multiple

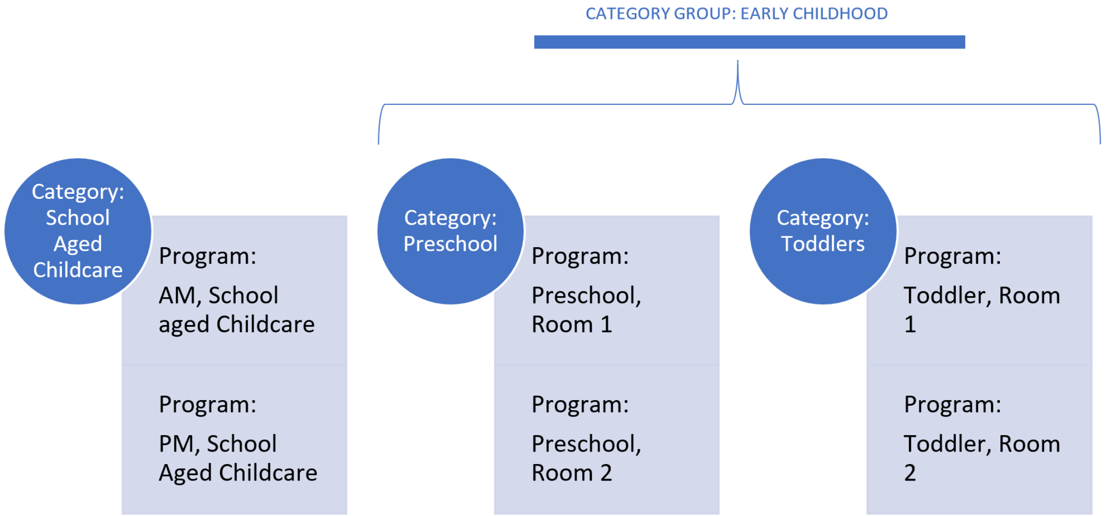
    times
  - Yes – there will be no duplicate check for students
33. Allow Multi-Select
    - No – parents will have to register for each program, one at a time.

      Please Note: this option must be used when using Plan Options
    - Yes – parents will be able to register for multiple programs within the same category at the same time
34. Display Confirmation Questions
    - Yes – confirmation questions will display during registration
    - No – confirmation questions will not display during registration
35. If applicable, when do you want pre-bill charged?
    - On Registration
    - On wait list Approval
36. Sequence # – number each category to update the order the categories display in on the new registration and portal
37. Late Selection Disclaimer
38. Color – select a hex color that will display during staff scheduling
39. Extra Information
40. Registration Catalog (Top) – add photos, details, etc. that will display when a parent selects the category, while the parent is choosing a room/program
41. Registration Catalog (Bottom) – add photos, details, etc. that will display when a parent selects the category, while the parent is choosing a room/program
42. Finishing Text – add photos, details, etc. that will display when a parent completes registration for the category

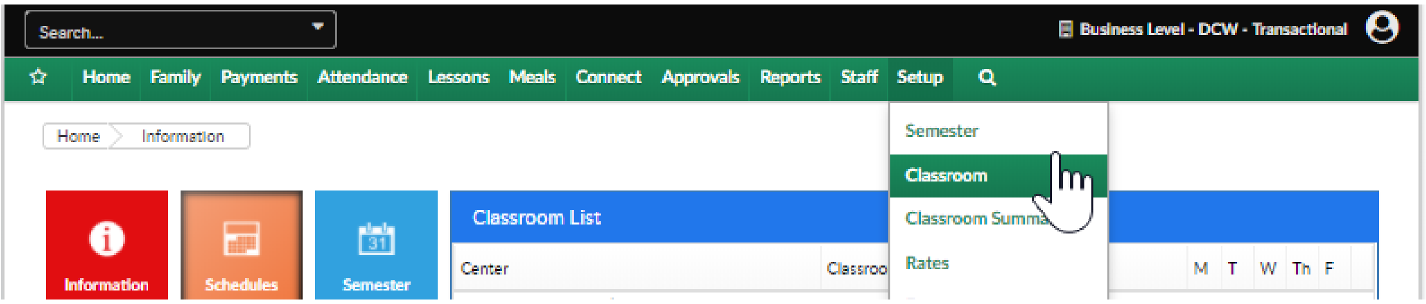
Creating a Category Group

Last Modified on 02/06/2018 9:04 am EST

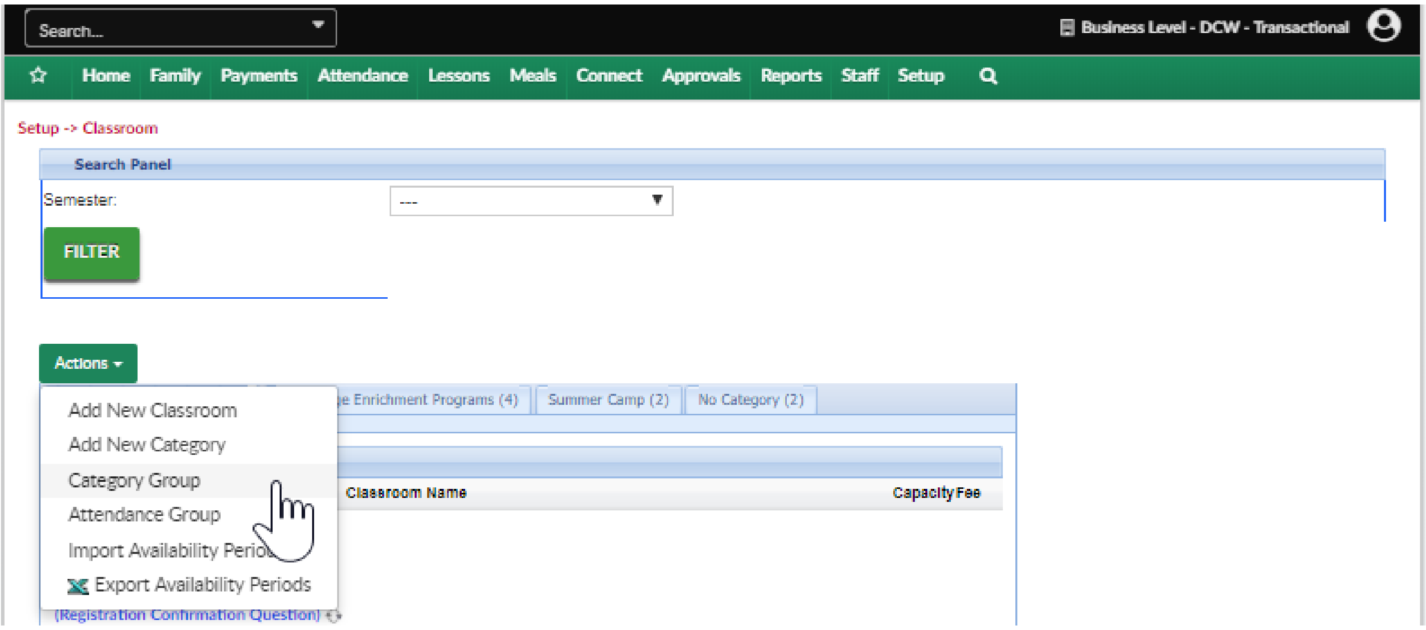
A Category Group is a collection of categories. This helps to provide another layer of organization for room setup- categories are added to category groups.



To add or edit a category group to the system go to the Setup > Room screen



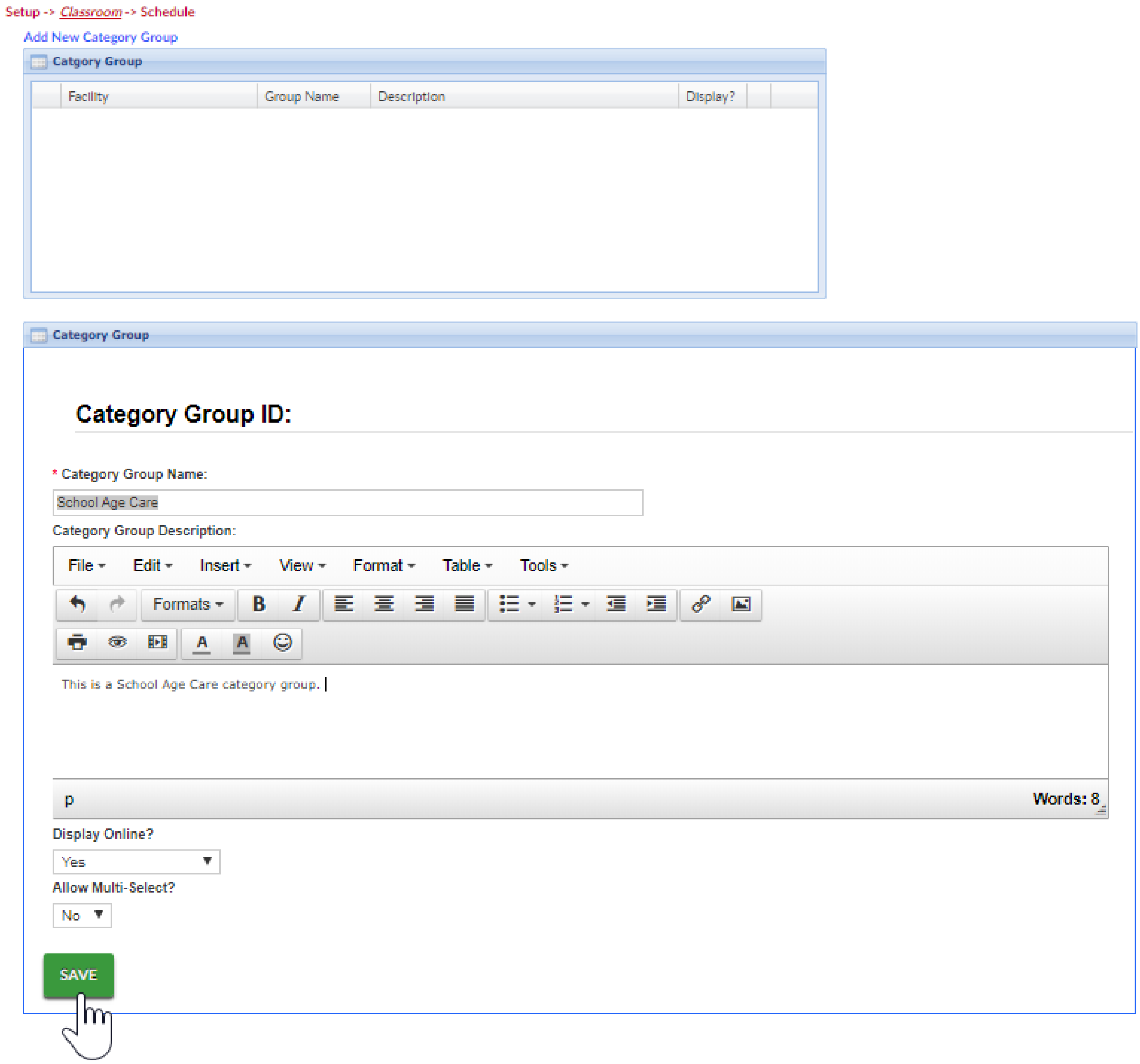
Select the Actions option, then select Category Group



To add a Category Group enter a name for the group and a description, from the Display Online menu select if the category group should display to both new and portal registrations (Yes), if the category group should not display to new OR portal registrations (No) or Connect Portal Only to ONLY display on the parent portal.

If a parent can multiselect within the category group change this field to Yes- this means parents could select more than one category under a category group.

Then press Save.



Setup -> Classroom -> Schedule

Add New Category Group

Catgory Group

Facility	Group Name	Description	Display?

Category Group

Category Group ID:

* Category Group Name: School Age Care

Category Group Description: This is a School Age Care category group.

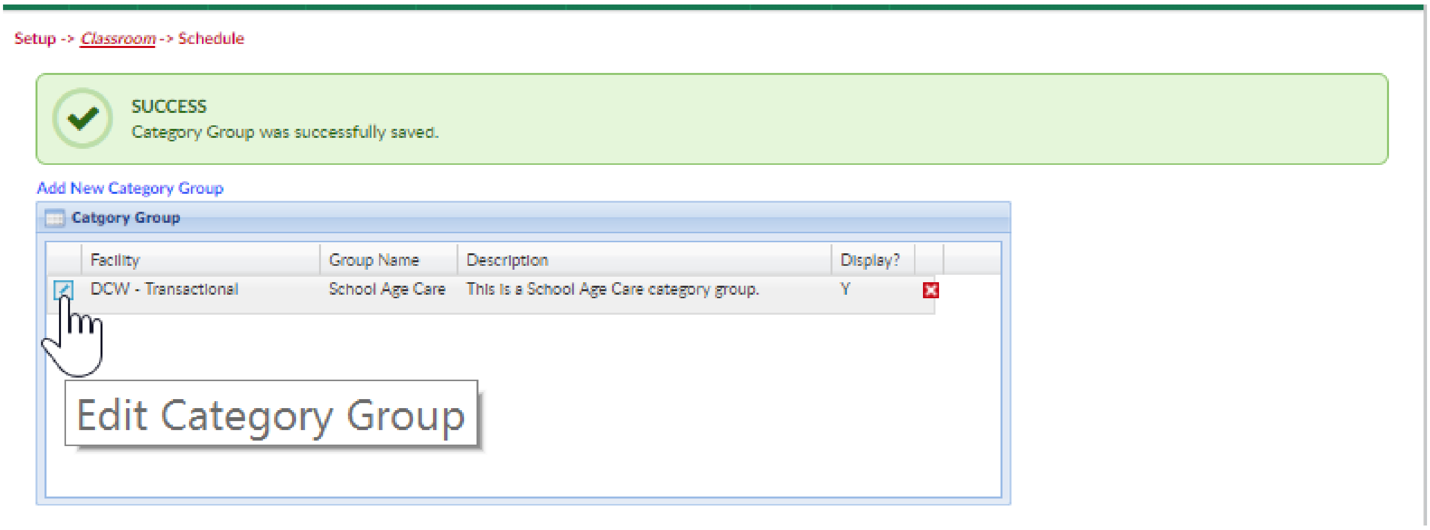
Words: 8

Display Online? Yes

Allow Multi-Select? No

To edit a category group press the edit icon.

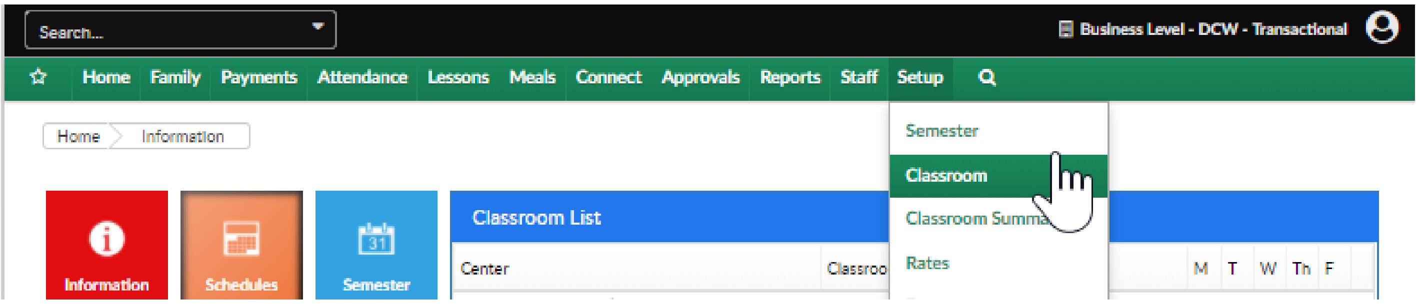
To delete a category group press the red x on the right side.


Setup -> *Classroom* -> Schedule

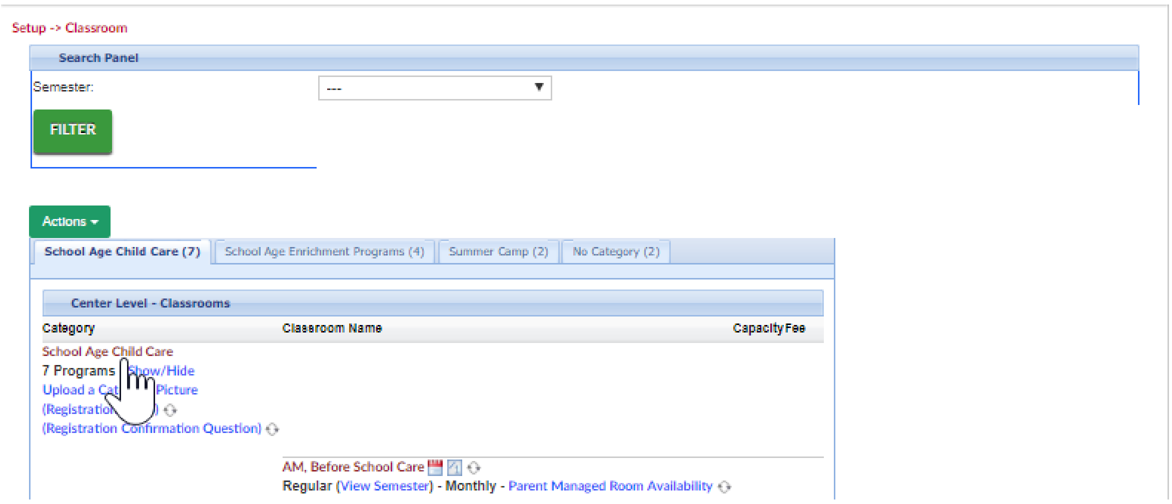
SUCCESS
Category Group was successfully saved.

	Facility	Group Name	Description	Display?	
☑	DCW - Transactional	School Age Care	This is a School Age Care category group.	Y	☒

Once a Category Group has been created go to the setup > room page



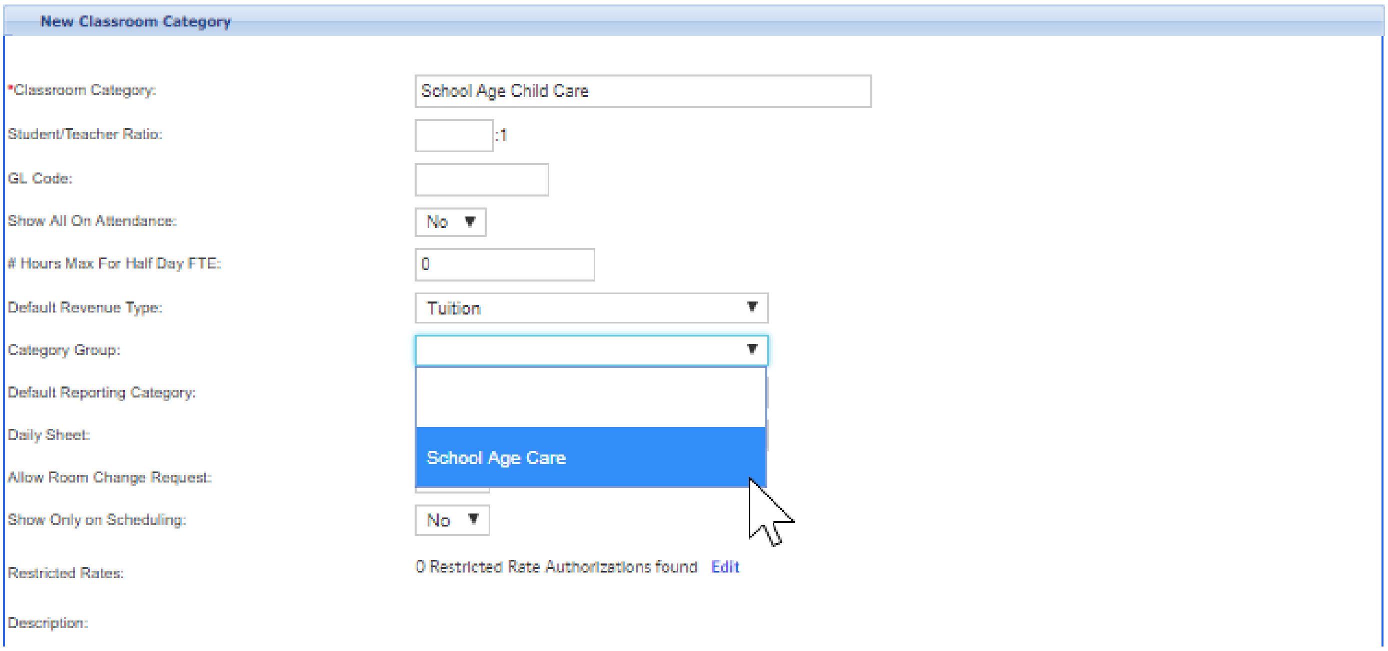
Click on the first category that should belong to the category group


Setup -> Classroom

Search Panel
Semester: ---

Category	Classroom Name	Capacity	Fee
School Age Child Care 7 Programs Show/Hide Upload a Cat Picture (Registratio) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability		

Select the Category Group name, then scroll to the bottom of the page and save.



New Classroom Category

*Classroom Category:	School Age Child Care
Student/Teacher Ratio:	:1
GL Code:	
Show All On Attendance:	No
# Hours Max For Half Day FTE:	0
Default Revenue Type:	Tuition
Category Group:	
Default Reporting Category:	
Daily Sheet:	
Allow Room Change Request:	
Show Only on Scheduling:	No
Restricted Rates:	0 Restricted Rate Authorizations found Edit
Description:	

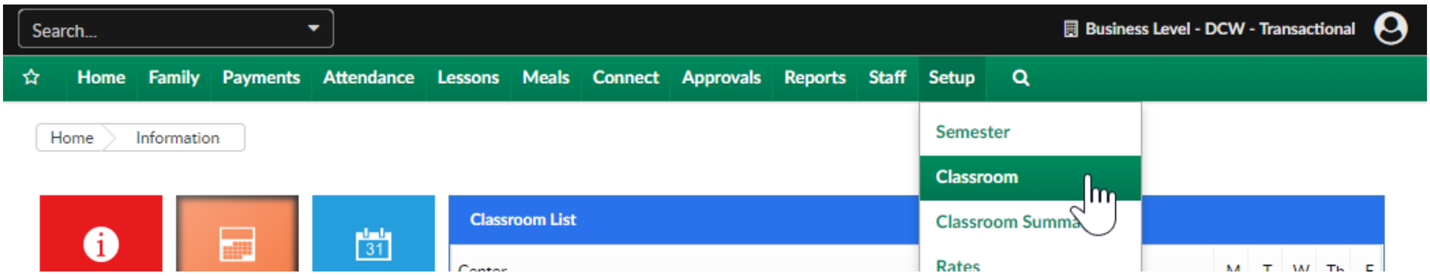
Setting Up Attendance Groups

Last Modified on 03/14/2018 9:34 am EDT

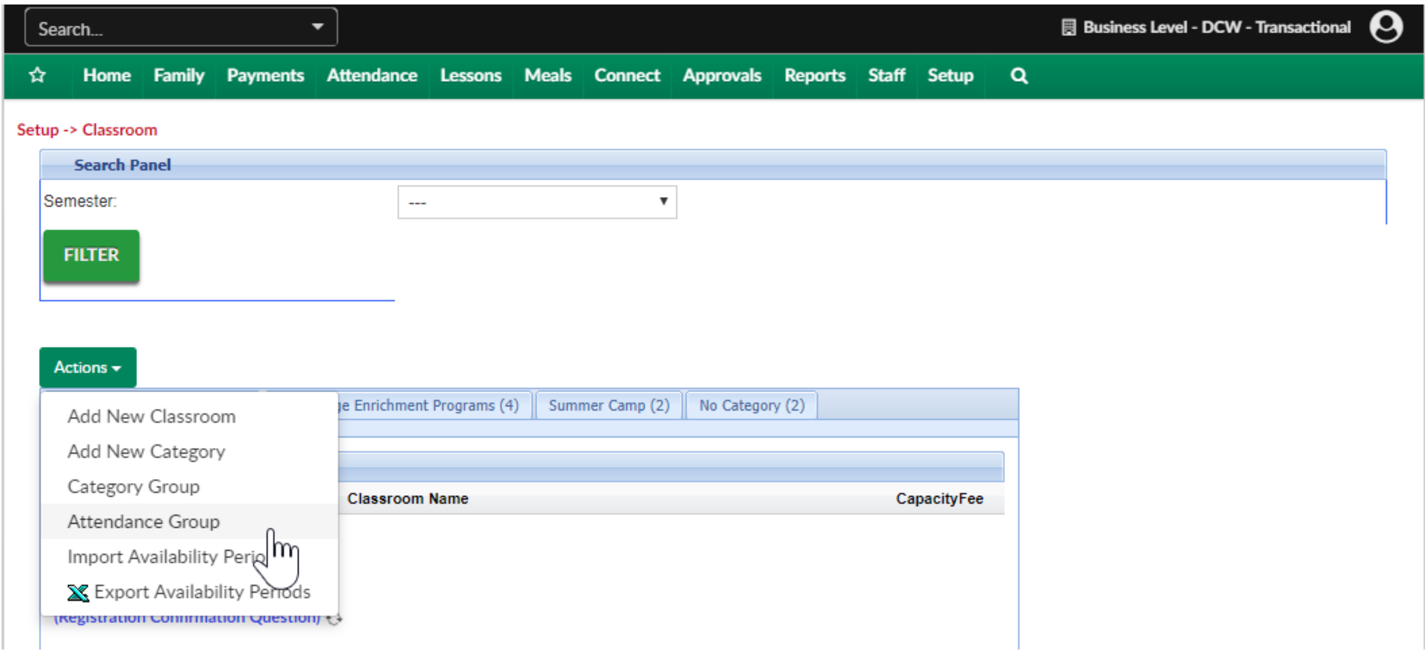
Attendance Groups in the system allow users to automatically group children in individual classrooms into one classroom for a set period of time.

For example if an attendance group is setup from 7:00 am to 8:00 to move children from all rooms to one room, when a parent checks a child in they will be checked into their schedule and then moved to the selected room.

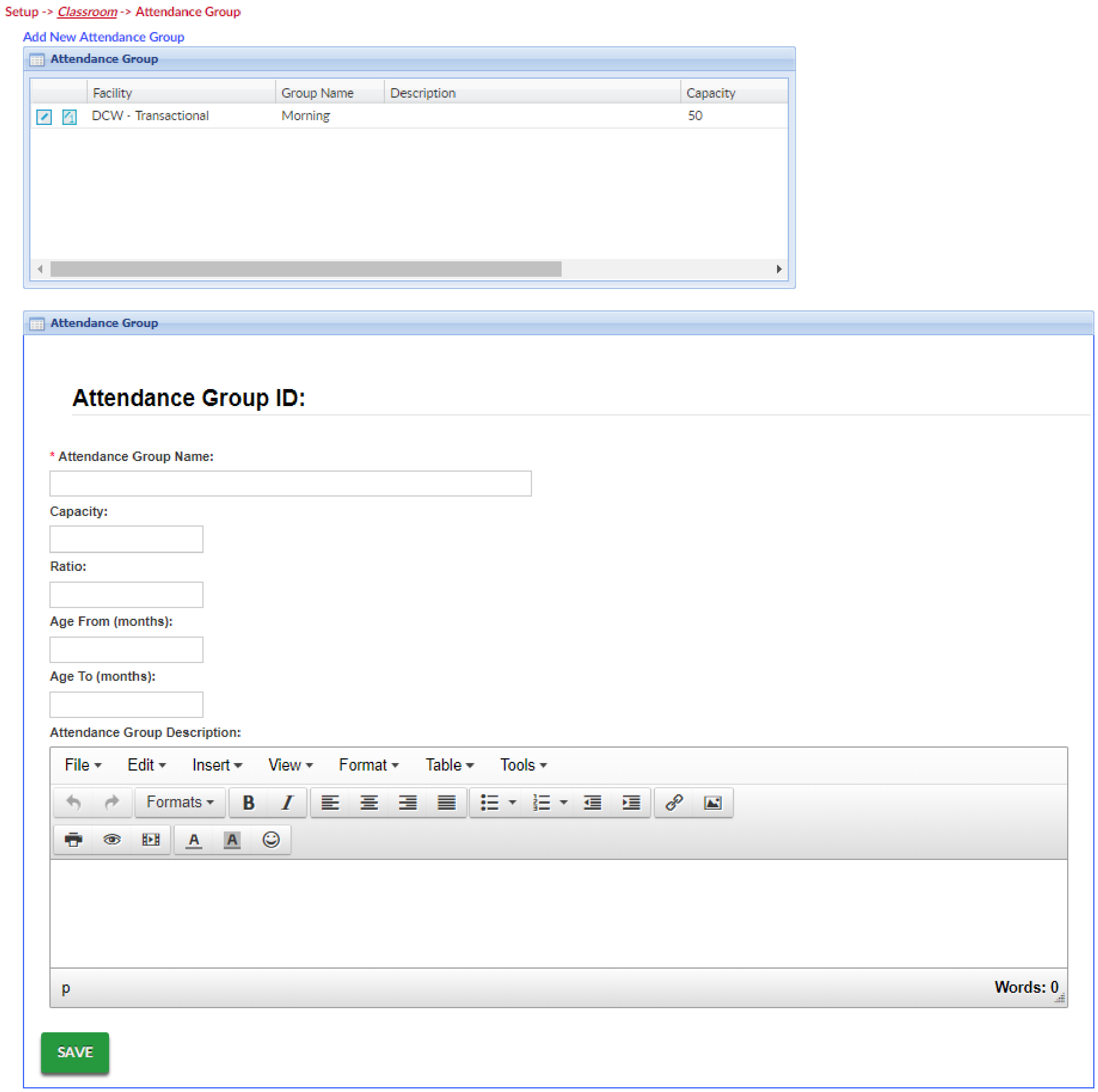
To setup Attendance Groups go to the Setup > Rooms page.



From the Actions menu, select Attendance Group option..



To add an attendance group enter an attendance group name, capacity, ratio, age from and to and attendance group description- then press Save.



Setup -> Classroom -> Attendance Group

Add New Attendance Group

Attendance Group

	Facility	Group Name	Description	Capacity
	DCW - Transactional	Morning		50

Attendance Group

Attendance Group ID:

* Attendance Group Name:

Capacity:

Ratio:

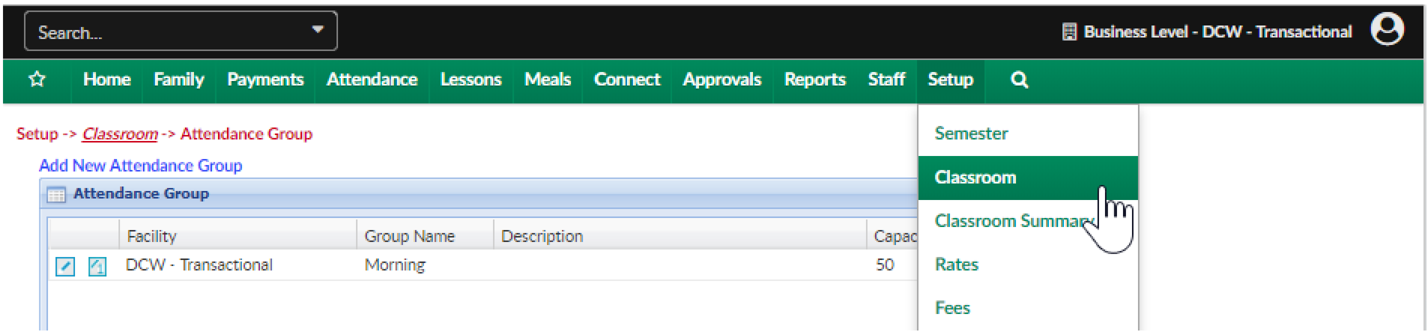
Age From (months):

Age To (months):

Attendance Group Description:

Words: 0

To add rooms to the attendance group go back to setup > room



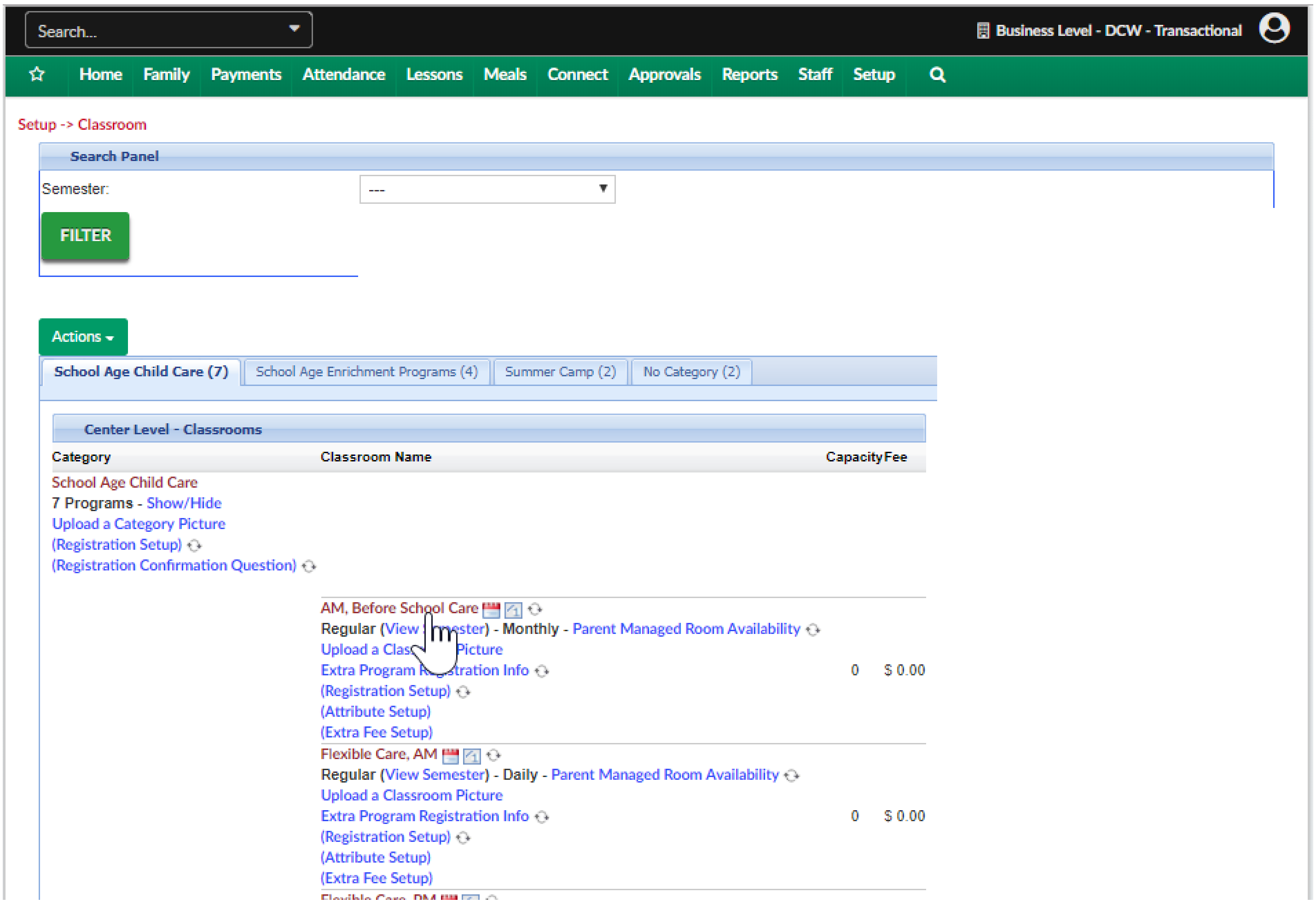
Setup -> Classroom -> Attendance Group

Add New Attendance Group

Attendance Group

	Facility	Group Name	Description	Capac
	DCW - Transactional	Morning		50

Select a classroom name, then scroll to the attendance group section.



Setup -> Classroom

Search Panel

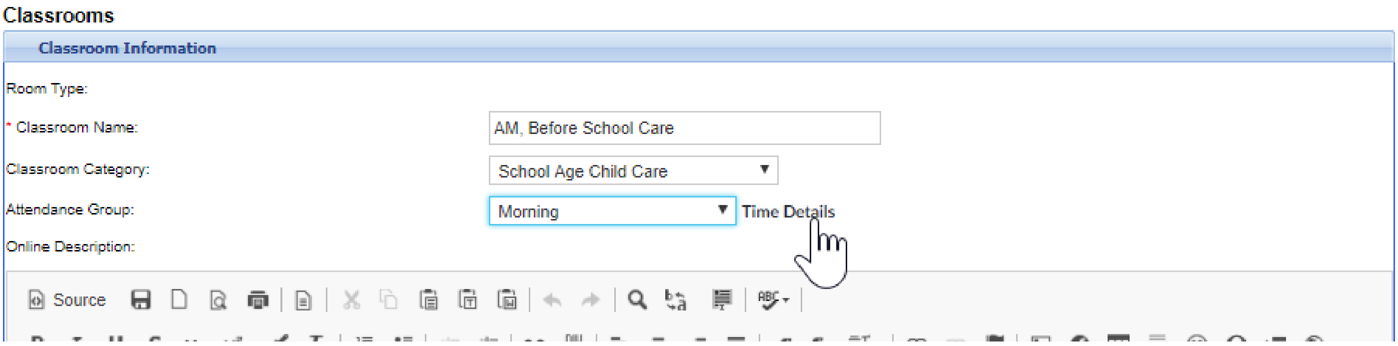
Semester: ---

School Age Child Care (7) | School Age Enrichment Programs (4) | Summer Camp (2) | No Category (2)

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Age Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, AM Regular (View Semester) - Daily - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

Select the attendance group, then press Time Details.



Classrooms

Classroom Information

Room Type:

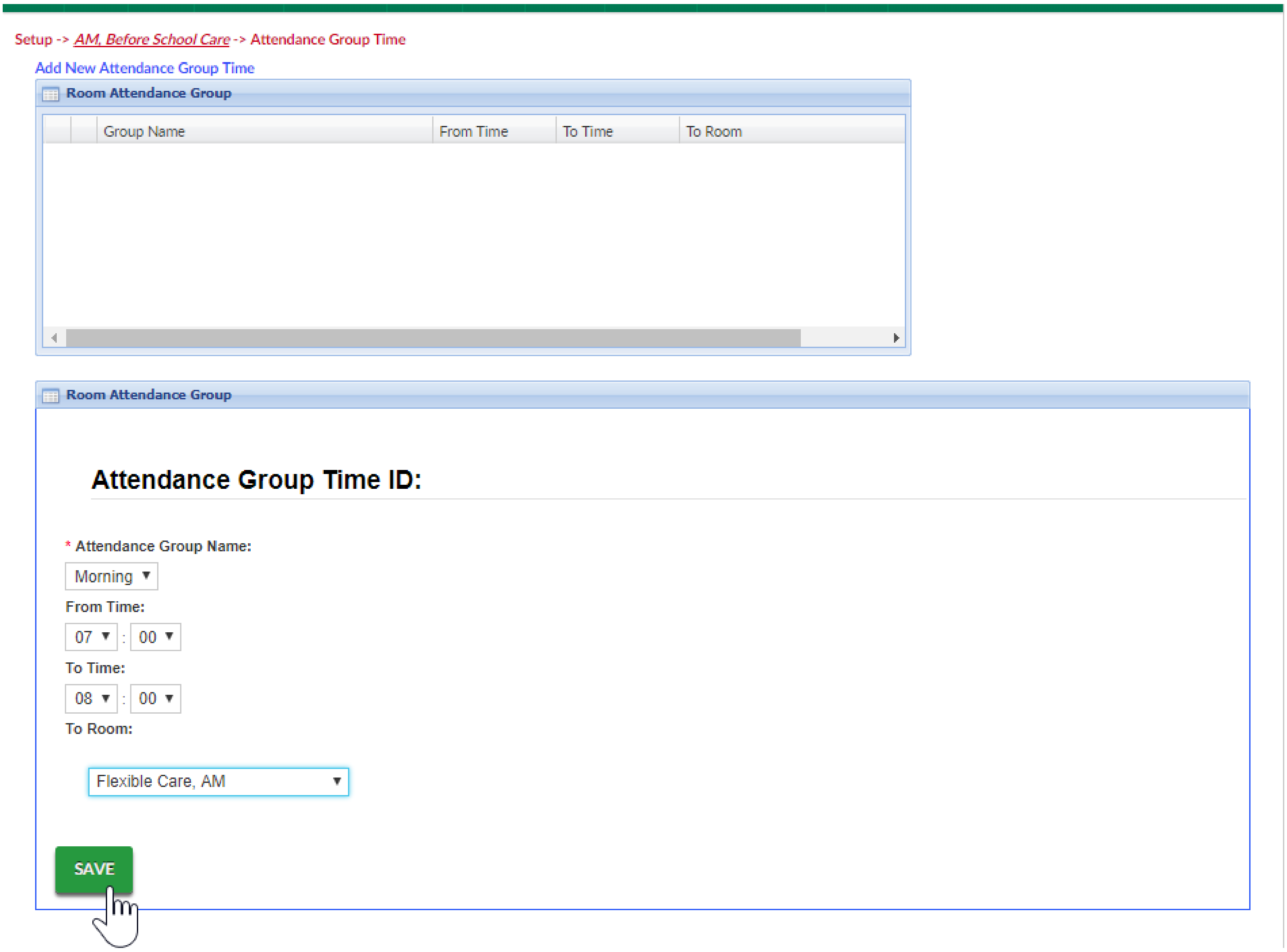
* Classroom Name: AM, Before School Care

Classroom Category: School Age Child Care

Attendance Group: Morning

Online Description:

Enter the attendance group name, then select the from and to time and which room the children should be moved to- then press Save.


Setup -> AM, Before School Care -> Attendance Group Time

Add New Attendance Group Time

Attendance Group Time ID:

* Attendance Group Name: Morning

From Time: 07 : 00

To Time: 08 : 00

To Room: Flexible Care, AM

Attendance Groups allow the combining of classrooms so a site can be more efficient with staff. mostly used morning and evenings sometimes for lunch or naps.

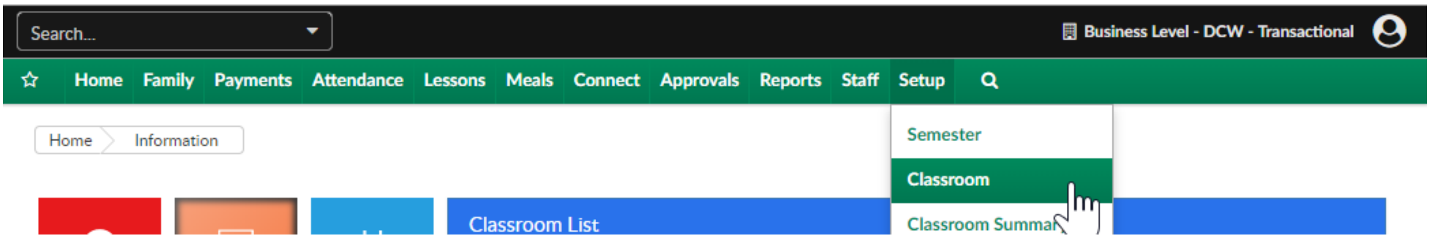
If a site is using the staff scheduling feature, attendance groups will add the expected classroom counts to the room they will be moved to so the correct amount of teachers will be scheduled.

Setup > Room, Category- Upload a Category Picture

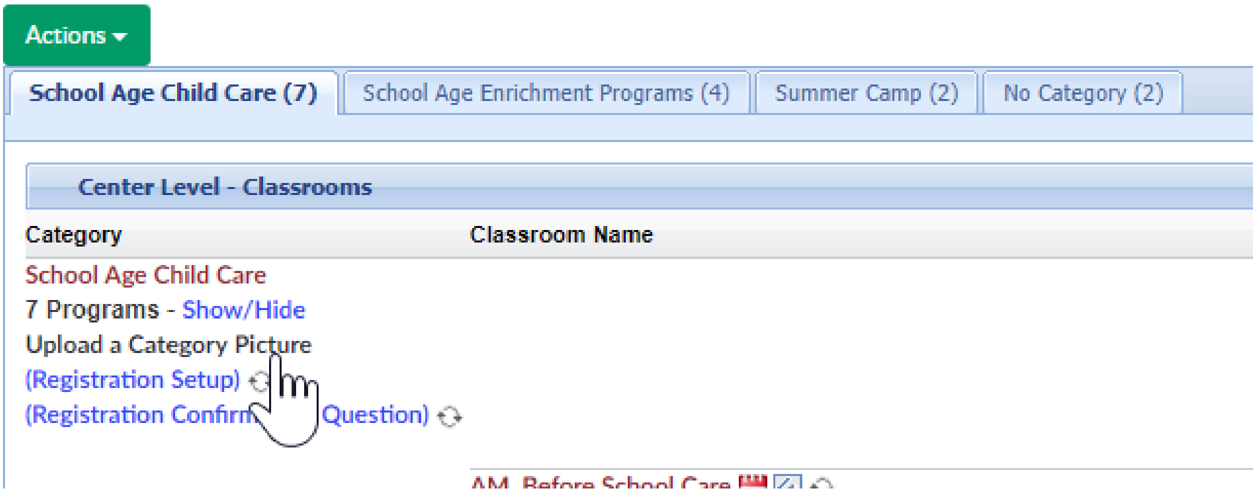
Last Modified on 02/12/2018 3:22 pm EST

Uploading a Category Picture allows a site to link to the picture in their description or finishing text.   The system typically only allows for linked images to be added.

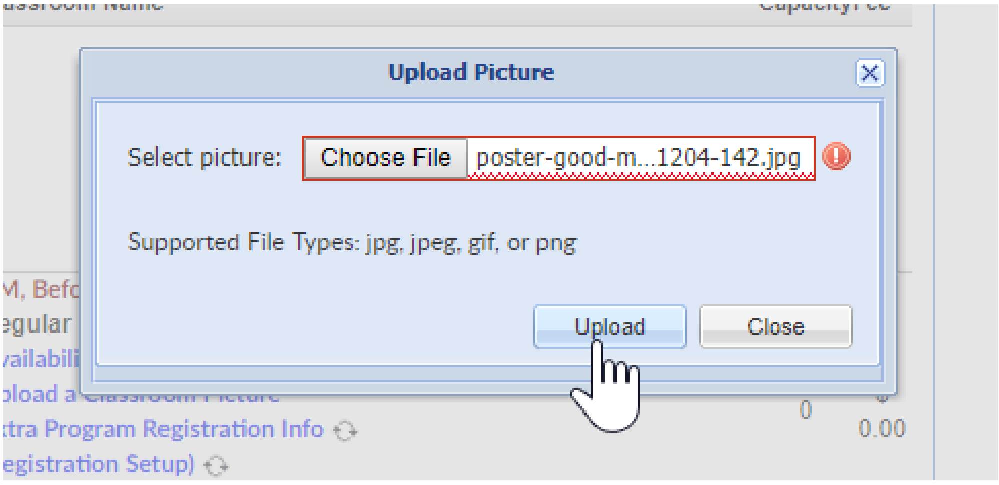
To add a picture to a category select the Setup option from the main menu, then select Classroom/Room/Program-



Then select the Upload a Category Picture link under the category name



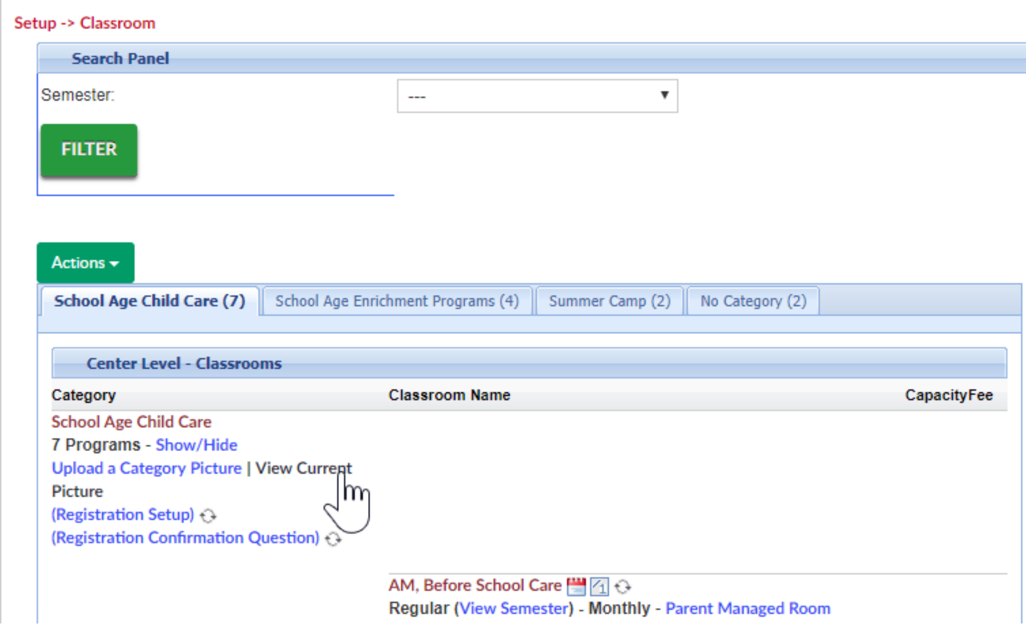
Add the file to the upload picture area by selecting Choose File, then press upload-



Select picture: poster-good-m...1204-142.jpg

Supported File Types: jpg, jpeg, gif, or png

Press View Current Picture to see the image that has been uploaded


Setup -> Classroom

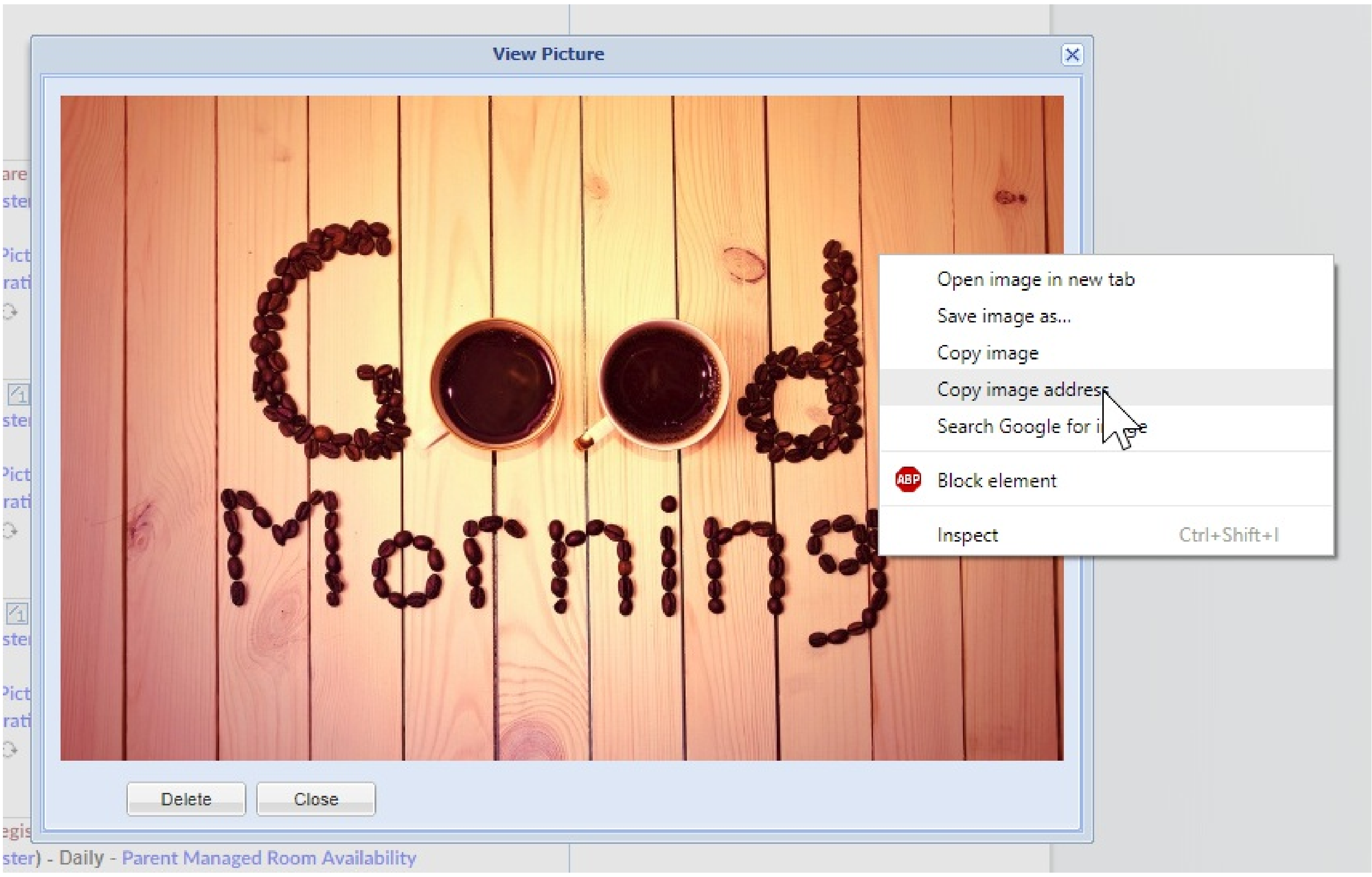
Search Panel

Semester: ---

Center Level - Classrooms

Category	Classroom Name	CapacityFee
School Age Child Care 7 Programs - Show/Hide Upload a Category Picture | View Current Picture (Registration Setup) (Registration Confirmation Question)		
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room	

To insert the image into descriptions or finishing text right click and select Copy Image Address.



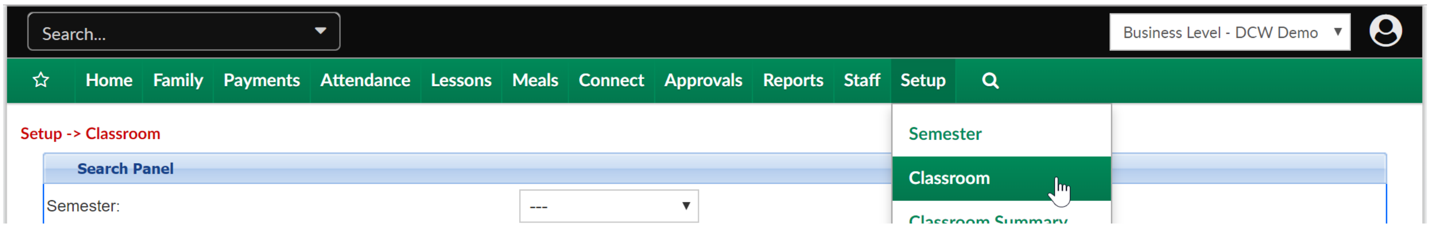
ster) - Daily - Parent Managed Room Availability

Setup > Room, Category- Registration Setup

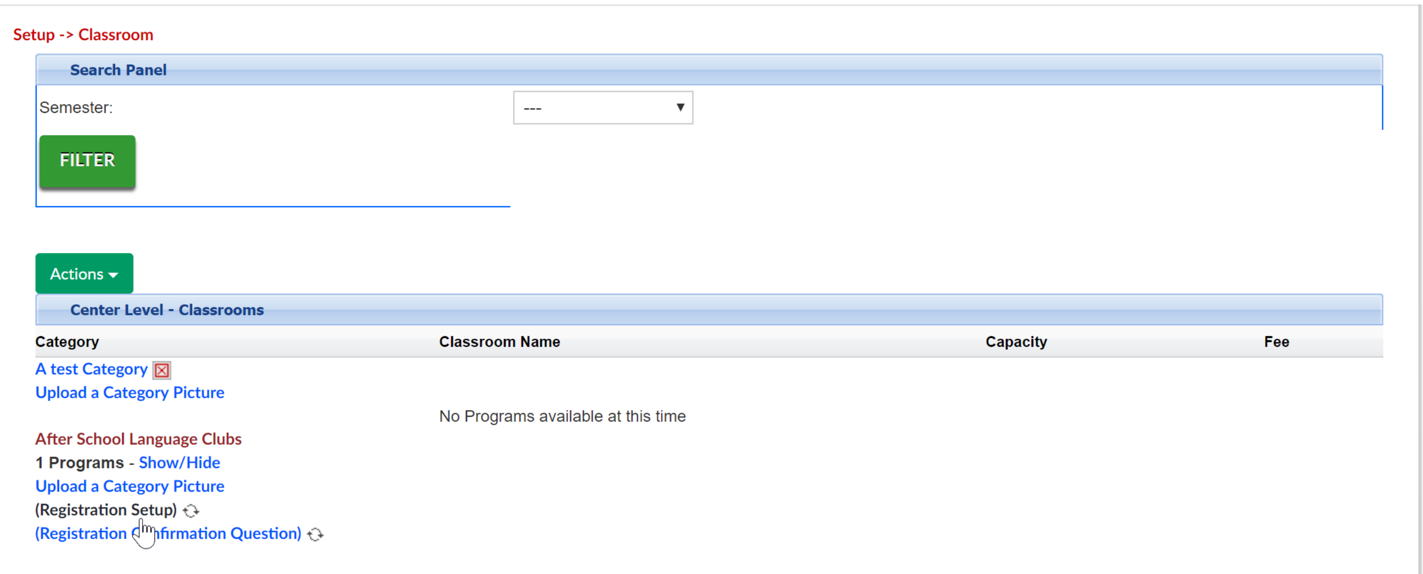
Last Modified on 03/14/2018 9:34 am EDT

The registration setup area allows users to set questions will that be displayed, hidden or required on registration forms. This setup can be created at the category level or the room/program level. Once registration setup has been completed at the Room/Program level the system will NEVER look at the category settings again for registration requirements.

Go to Setup, then select Room/Program/Classroom-



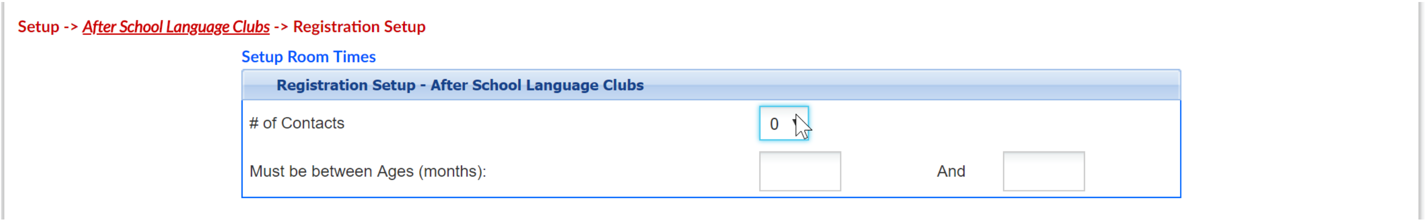
Then select Registration Setup under the category name-



Category	Classroom Name	Capacity	Fee
A test Category ☒ Upload a Category Picture	No Programs available at this time		
After School Language Clubs 1 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			

On the Registration Setup page select the number of contacts that should be required for registration into the program.

Then enter the age range in months for the children that are able to register for the program, the age in months relates to the child's CURRENT age, not the age they have to be when the room/program begins-



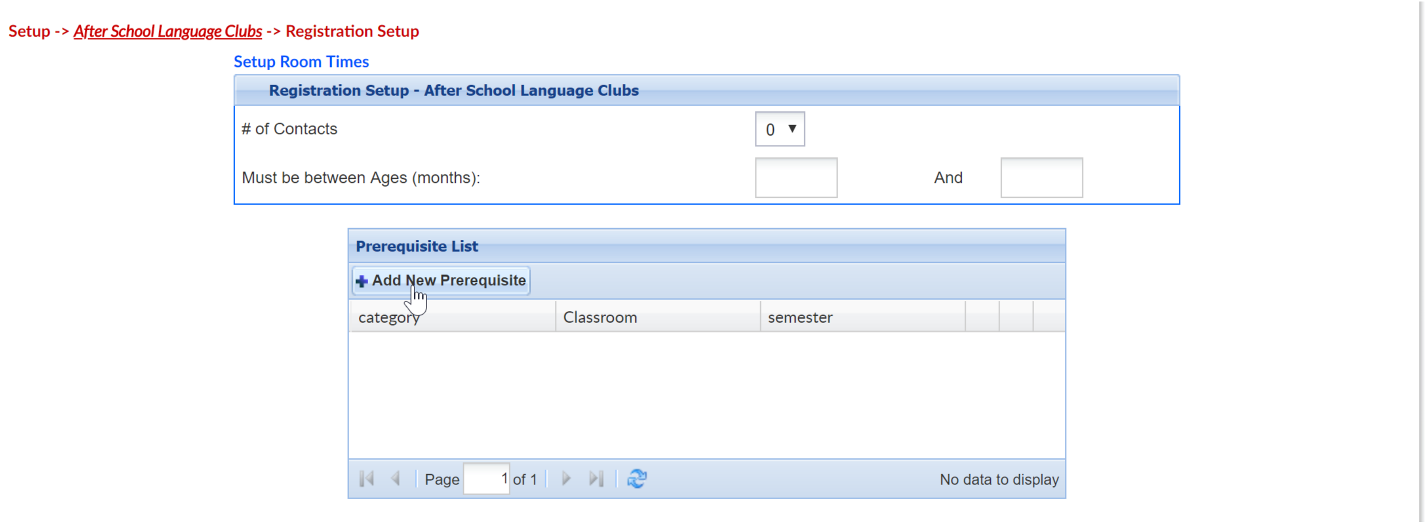
Setup -> *After School Language Clubs* -> Registration Setup

Setup Room Times

Registration Setup - After School Language Clubs

# of Contacts	0		
Must be between Ages (months):		And	

If Prerequisites exist for the program select Add New Prerequisite-



Setup -> *After School Language Clubs* -> Registration Setup

Setup Room Times

Registration Setup - After School Language Clubs

# of Contacts	0		
Must be between Ages (months):		And	

Prerequisite List

category	Classroom	semester

Page 1 of 1

No data to display

For each options under the Field Requirements on the setup screen select Display, Hide or Require.

As soon as the settings on this page are saved the registration requirements will be updated.

Available fields are listed below-

Field	Type
First Name	Contact Fields
Last Name	Contact Fields
Address	Contact Fields
Address 2	Contact Fields
City	Contact Fields
State	Contact Fields
Zip	Contact Fields
Home Phone	Contact Fields
Work Phone	Contact Fields
Cell Phone	Contact Fields

Email	Contact Fields
Relationship	Contact Fields
Birth Certificate - Doc	Documents and Sponsors
Custody Papers - Doc	Documents and Sponsors
Immunizations - Doc	Documents and Sponsors
IEP - Doc	Documents and Sponsors
IEP Indicator	Documents and Sponsors
Sponsor Indicator	Documents and Sponsors
Discount Selection	Documents and Sponsors
Sibling Name (If Sibling Discount)	Documents and Sponsors
Court Restriction Indicator	Documents and Sponsors
Court Order Date	Documents and Sponsors
Additional	Documents and Sponsors
Resides With	Documents and Sponsors
Previous Summer Program	Documents and Sponsors
Previous School Program	Documents and Sponsors
Previous Preschool	Documents and

Program	Sponsors
Previous Pre-screening	Documents and Sponsors
School Attending Kindergarten	Documents and Sponsors
In District	Documents and Sponsors
Open Enrollment Completed?	Documents and Sponsors
Photo Release	Documents and Sponsors
Booster Seat	Documents and Sponsors
Photo Release Program Only	Documents and Sponsors
Sunscreen (Parent Provided)	Documents and Sponsors
Sunscreen (self apply)	Documents and Sponsors
Additional T-Shirt	Documents and Sponsors
T-Shirt Size	Documents and Sponsors
Swim Level	Documents and Sponsors
Swim Concerns	Documents and Sponsors
Open Swim	Documents and Sponsors
Insect Repellent	Documents and Sponsors

School Year Arrival/Departure	Documents and Sponsors
Summer School Arrival/Departure	Documents and Sponsors
Before School	Documents and Sponsors
Fall School Departure	Documents and Sponsors
Pickup Notes	Documents and Sponsors
Height	Documents and Sponsors
Weight	Documents and Sponsors
Hair Color	Documents and Sponsors
Eye Color	Documents and Sponsors
Sleep Position	Documents and Sponsors
After School	Documents and Sponsors
Food/Milk Allergy	Health
Special Food Needs	Health
Environmental Allergy	Health
Medication Allergy	Health
Epi Pen	Health
Other Allergy	Health
Asthma	Health
Inhaler	Health
Cerebral palsy/motor	

disorder	Health
Cognitive/learning disabilities	Health
Epilepsy/Seizures	Health
Chicken Pox	Health
Glasses	Health
Cold Count	Health
Colds	Health
ADD/ADHD	Health
Behavioral Issues	Health
Other Conditions	Health
Medications	Health
Participation Restrictions	Health
Symptoms	Health
Special Problems/Fears	Health
Additional Support	Health
Call Parents	Health
Immunization Exemption	Health
Special Instructions	Health
Personal Conviction Exemption	Health
Religious Exemption	Health
Motor Skills Detail	Health
Seizure Date	Health
Cognitive Info	Health
Participation Restriction Indicator	Health
Medication Info	

Indicator	Health
Other Medication Indicator	Health
Other Medication Info	Health
Reassessment and Triggers	Health
Medication Side Effects Info	Health
Trigger Details	Health
Hep B - Hepatitis B	Health
DT - Diphtheria, Tetanus (pediatric)	Health
Tdap - Tetanus, Diphtheria, Pertussis	Health
Hib - Haemophilus influenzae type b	Health
Td - Tetanus, Diphtheria	Health
IPV/OPV - Polio	Health
PCV - Pneumococcal Conjugate	Health
MMR - Measles, Mumps, Rubella	Health
Varicella - Chickenpox	Health
HPV - Human Papillomavirus	Health
Rota - Rotavirus	Health
Hep A - Hepatitis A	Health
MCV4/MPSV4 - Meningococcal	Health
Flu - Influenza	Health

Mumps	Health
DTP - Diphtheria, Tetanus, Pertussis	Health
Rubella	Health
Polio	Health
Diabetes	Health
Autism	Health
Accommodations	Health
DTaP - Diphtheria, Tetanus, Pertussis (pediatric)	Health
First Name	Parent/Guardian Fields
Last Name	Parent/Guardian Fields
Address	Parent/Guardian Fields
Address 2	Parent/Guardian Fields
City	Parent/Guardian Fields
State	Parent/Guardian Fields
Zip	Parent/Guardian Fields
Home Phone	Parent/Guardian Fields
Work Phone	Parent/Guardian Fields
Cell Phone	Parent/Guardian Fields
Pager	Parent/Guardian Fields
Birthday	Parent/Guardian Fields
Email Address	Parent/Guardian Fields
Best Address	Parent/Guardian Fields
Best Phone	Parent/Guardian Fields
Driver's License #	Parent/Guardian Fields
Electronic Signature	Parent/Guardian Fields
Driver's License State	Parent/Guardian Fields
Primary License Plate	Parent/Guardian Fields
Preferred Statement	

Delivery Method	Parent/Guardian Fields
Employer Information	Parent/Guardian Fields
Employer Name	Parent/Guardian Fields
Employee ID	Parent/Guardian Fields
Employee Work Location	Parent/Guardian Fields
Relationship	Parent/Guardian Fields
Last Name	Student/Child Fields
First Name	Student/Child Fields
Birthday	Student/Child Fields
Middle Name	Student/Child Fields
Sex	Student/Child Fields
Address 2	Student/Child Fields
Address	Student/Child Fields
City	Student/Child Fields
State	Student/Child Fields
Home Phone	Student/Child Fields
Zip	Student/Child Fields
Email	Student/Child Fields
Grade	Student/Child Fields
School Attending	Student/Child Fields
Student ID	Student/Child Fields
Custody papers have been provided?	Student/Child Fields
Language Spoken	Student/Child Fields
Secondary Language?	Student/Child Fields
Interpreter Language	Student/Child Fields
Interpreter Needed?	Student/Child Fields
Insurance Company	Student/Child Fields
Insurance Covered?	Student/Child Fields

Insurance Policy Number?	Student/Child Fields
Hospital Address	Student/Child Fields
Hospital	Student/Child Fields
Hospital Phone	Student/Child Fields
Doctor's Address	Student/Child Fields
Doctor's Name	Student/Child Fields
Doctor's Phone	Student/Child Fields
Dentist's Address	Student/Child Fields
Dentist's Name	Student/Child Fields
Dentist's Practice	Student/Child Fields
Dentist's Phone	Student/Child Fields
In an Emergency Call First	Student/Child Fields
Telephone Authorization Code	Student/Child Fields
The following person(s) may not remove my child from the facility	Student/Child Fields
Is child allergic to food or other substances? (If so, name foods or substances to be avoided and procedure to follow if reaction occurs.)	Student/Child Fields
Is child usually susceptible to infections and if so, what precautions need	

to be taken?	Student/Child Fields
Is child subject to convulsions and what should be our procedure if one occurs?	Student/Child Fields
Is there any physical condition that we should be aware of and what precautions should be taken (heart trouble, foot problem, hearing impairment, hernia, etc.)?	Student/Child Fields
Additional Comments	Student/Child Fields
Other special instructions	Student/Child Fields
Admission Date	Student/Child Fields

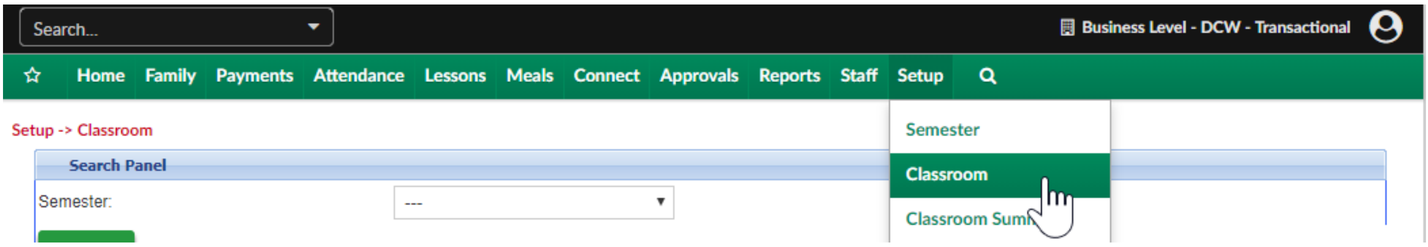
Setup > Room, Category- Registration Confirmation Questions

Last Modified on 02/12/2018 3:29 pm EST

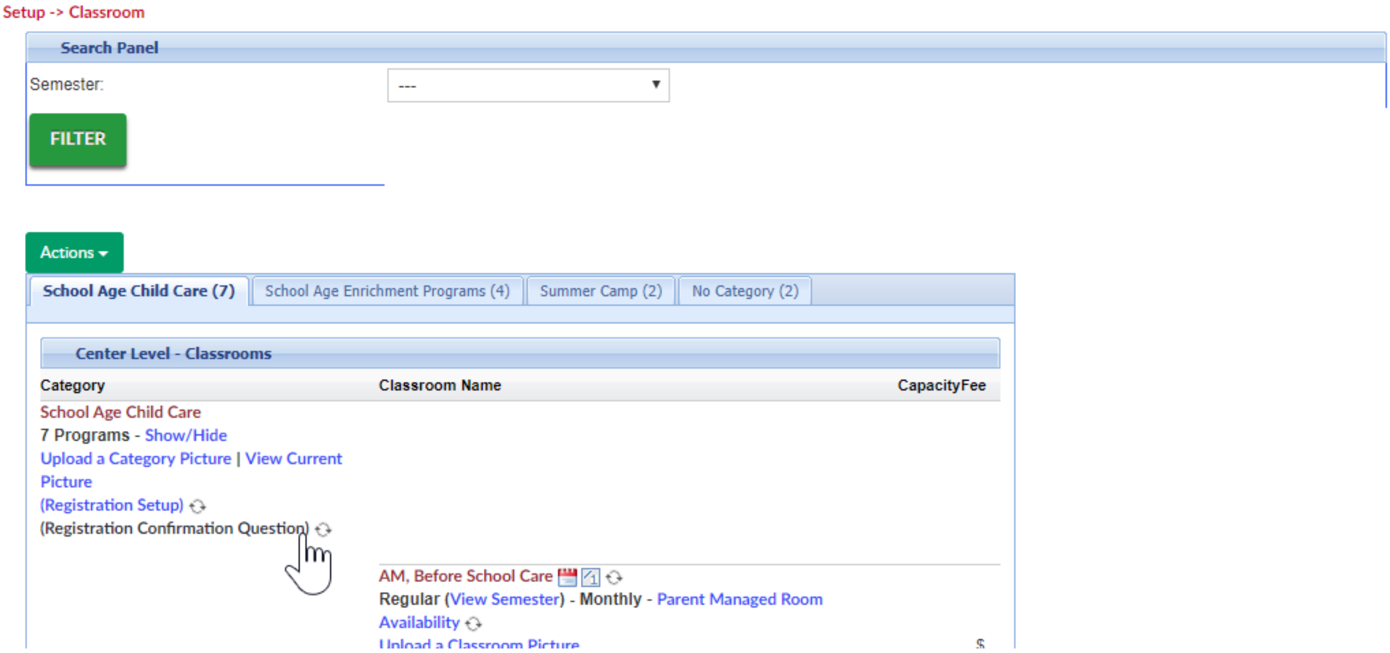
Registration confirmation questions allow for sites to ask their parents to verify information before registration is complete. These types of questions are typically questions such as- "I confirm I have read..." "I agree to the financial policies..." etc.

Parents must check a box next to each question before they are able to complete registration.

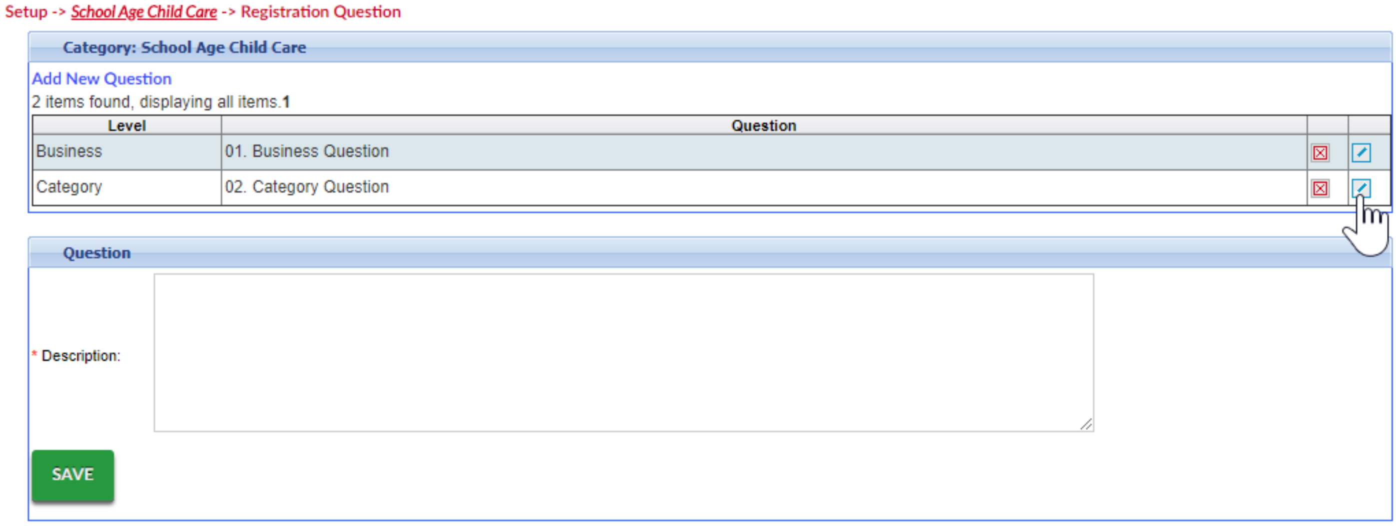
From the main menu select Setup, then select Setup Room/Classroom/Program



On the Setup screen select the Registration Confirmation Question link-



Questions will display from the business level and from the category level. ONLY EDIT CATEGORY LEVEL QUESTIONS HERE.


Setup -> School Age Child Care -> Registration Question

Category: School Age Child Care

Add New Question

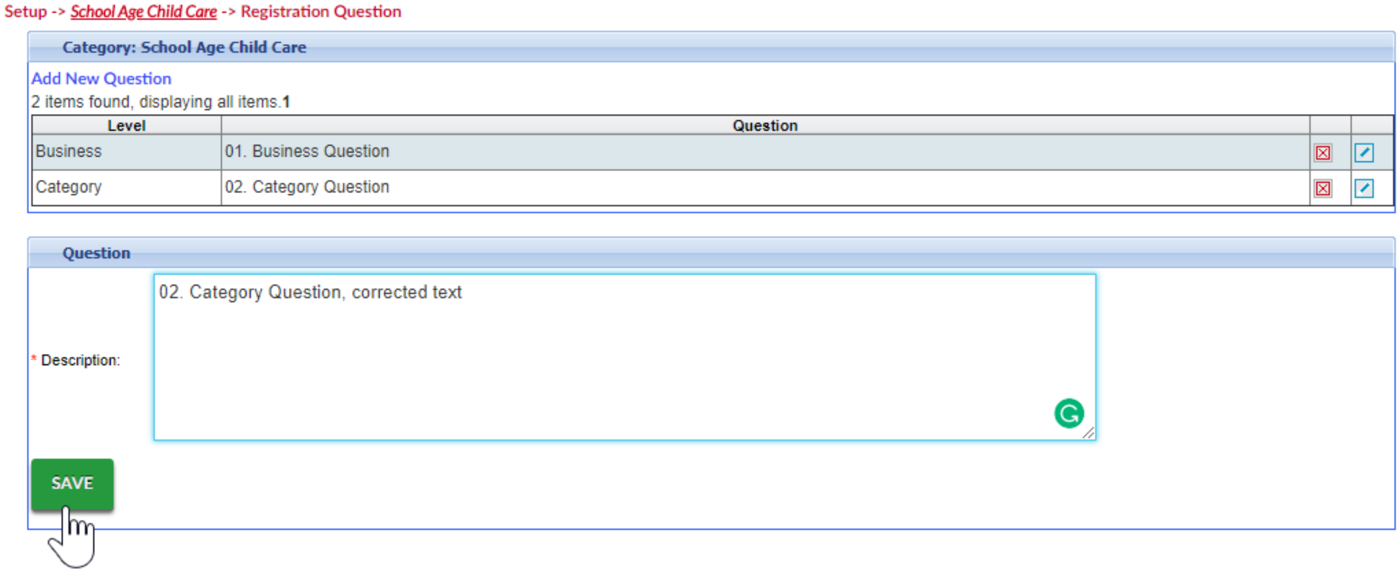
2 items found, displaying all items.**1**

Level	Question		
Business	01. Business Question	☒	✎
Category	02. Category Question	☒	✎

Question

* Description:

To edit a question select the green edit icon. Type in corrected text and then press save.


Setup -> School Age Child Care -> Registration Question

Category: School Age Child Care

Add New Question

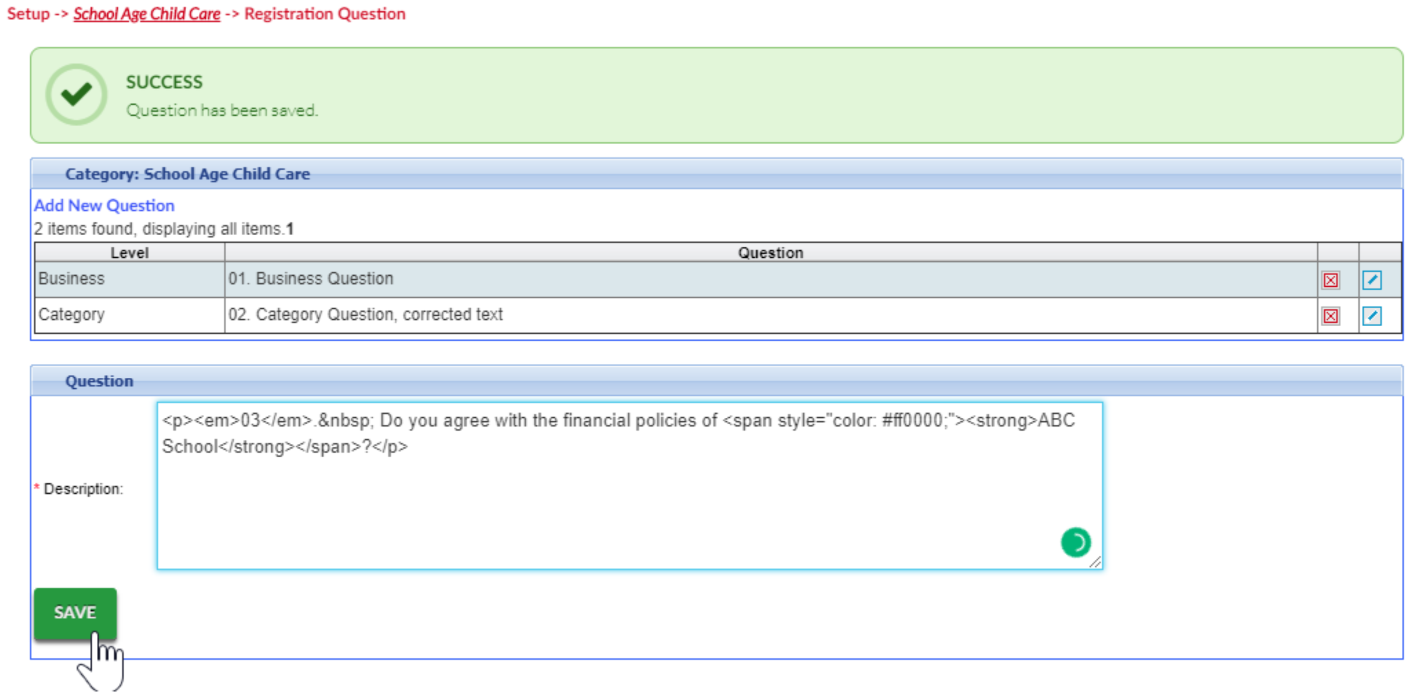
2 items found, displaying all items.**1**

Level	Question		
Business	01. Business Question	☒	✎
Category	02. Category Question	☒	✎

Question

* Description: 02. Category Question, corrected text

If further formatting is desired, HTML formmating can be writted and inserted into the confirmation question box.



Setup -> School Age Child Care -> Registration Question

SUCCESS
Question has been saved.

Category: School Age Child Care

Add New Question

2 items found, displaying all items.**1**

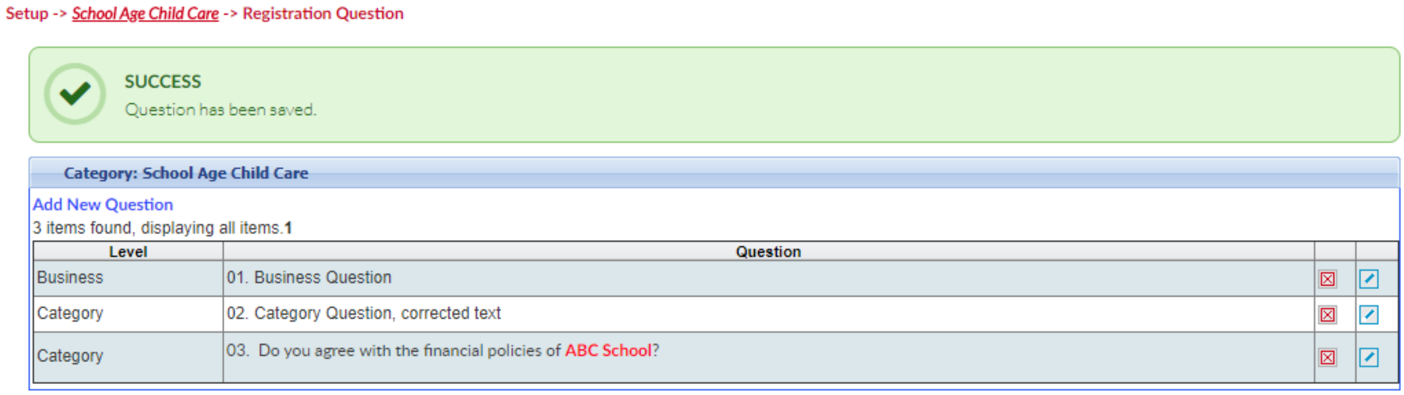
Level	Question		
Business	01. Business Question	☒	✎
Category	02. Category Question, corrected text	☒	✎

Question

* Description:

```
<p><em>03</em>.&nbsp; Do you agree with the financial policies of <span style="color: #ff0000;"><strong>ABC School</strong></span>?</p>
```

A preview of the how the text will display will show when saved-



Setup -> School Age Child Care -> Registration Question

SUCCESS
Question has been saved.

Category: School Age Child Care

Add New Question

3 items found, displaying all items.**1**

Level	Question		
Business	01. Business Question	☒	✎
Category	02. Category Question, corrected text	☒	✎
Category	03. Do you agree with the financial policies of **ABC School**?	☒	✎

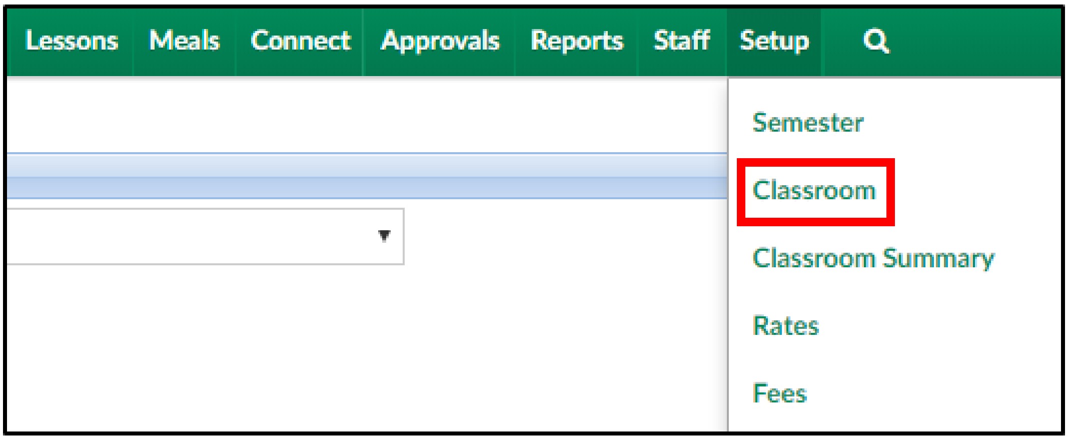
Setup > Room, Room/Program (View Semester)

Last Modified on 12/04/2018 9:23 am EST

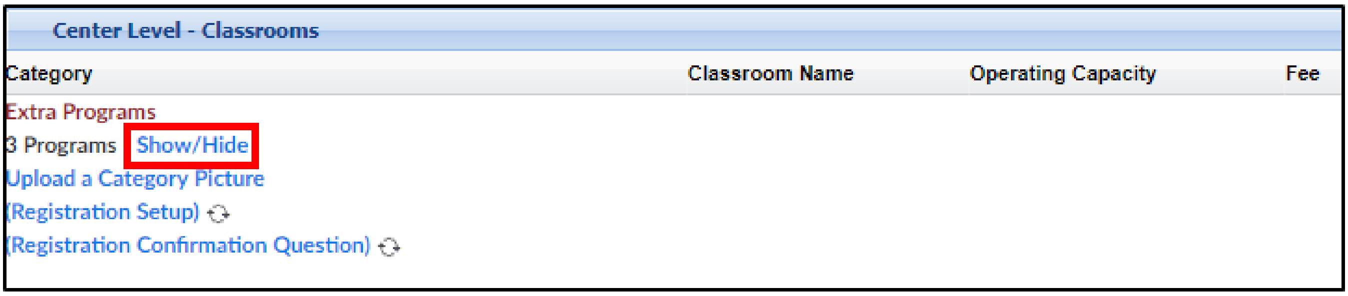
The View Semester link under each Room/Program's name allows users to update semester specific information for each room/program.

One room can be attached to many semesters, this means that the room/program can be used over and over again if the program setup stays the same every semester.

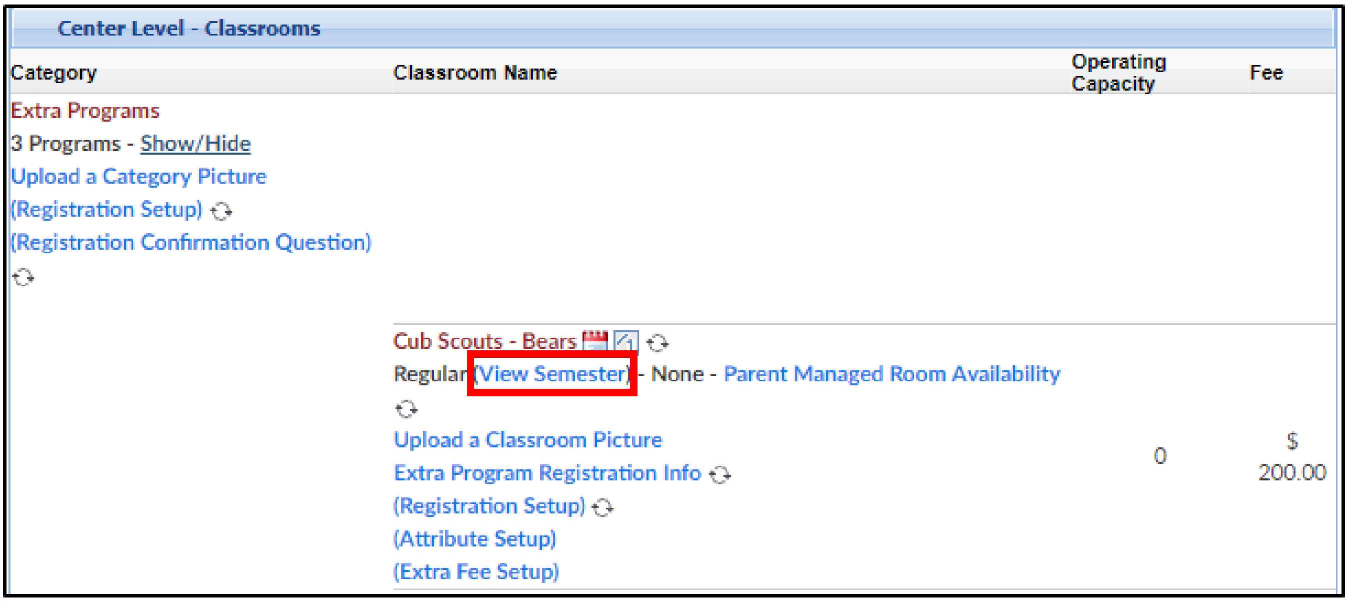
1. Click Setup from the menu bar, then select Room/Classroom



2. Locate the correct Category and click Show/Hide, if necessary to view the rooms



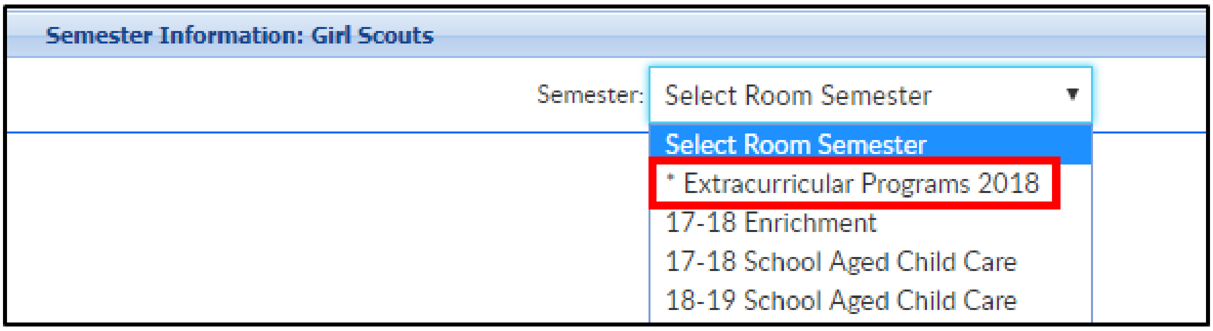
3. Once the rooms are displayed, click View Semester



Center Level - Classrooms

Category	Classroom Name	Operating Capacity	Fee
Extra Programs 3 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	Cub Scouts - Bears Regular (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 200.00

4. Select the correct Semester from the drop-down. Please Note: if a room is already attached to a semester, an asterisk (*) will display next to the semester name



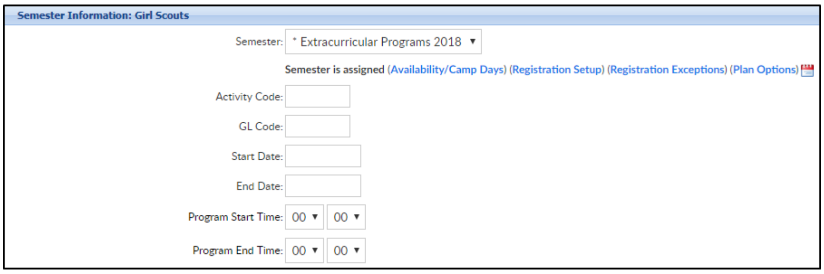
Semester Information: Girl Scouts

Semester: Select Room Semester

5. Once the Semester Information screen appears, complete the necessary fields. Not all fields are required; the required fields will have an asterisk (*) next to the label

Available Fields:

- Semester Information
  - Availability/Camp Days - allows administrators to add field trips or fees for days of care to an overall room/semester pairing
  - Activity Code - enter the course number that should display on registration, if applicable
  - GL Code - enter the accounting general ledger account number, if applicable
  - Start Date - select the start date



Semester Information: Girl Scouts

Semester: * Extracurricular Programs 2018

Semester is assigned (Availability/Camp Days) (Registration Setup) (Registration Exceptions) (Plan Options)

Activity Code:

GL Code:

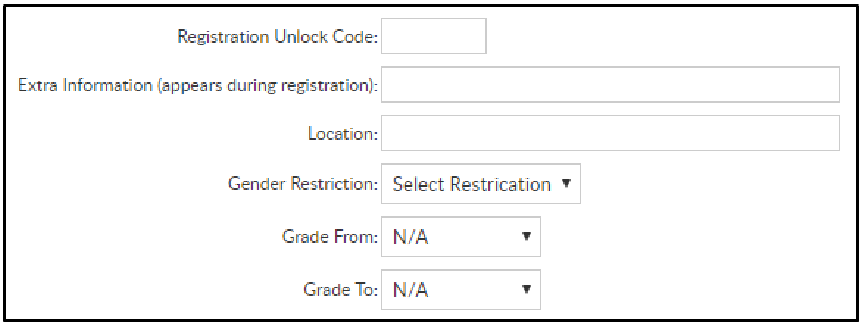
Start Date:

End Date:

Program Start Time: 00 00

Program End Time: 00 00

- End Date - select the end date
- Program Start Time - select the program start time using a 24-hour clock
- Program End Time- select the program end time using a 24-hour clock
- Registration Unlock Code - if registration should be restricted to certain families, enter a code here and provide to families as needed. This code can be numbers, letters, or special characters, max of 25 characters
- Extra Information (Appears During Registration) - enter any detail parents should know before registering



Registration Unlock Code:

Extra Information (appears during registration):

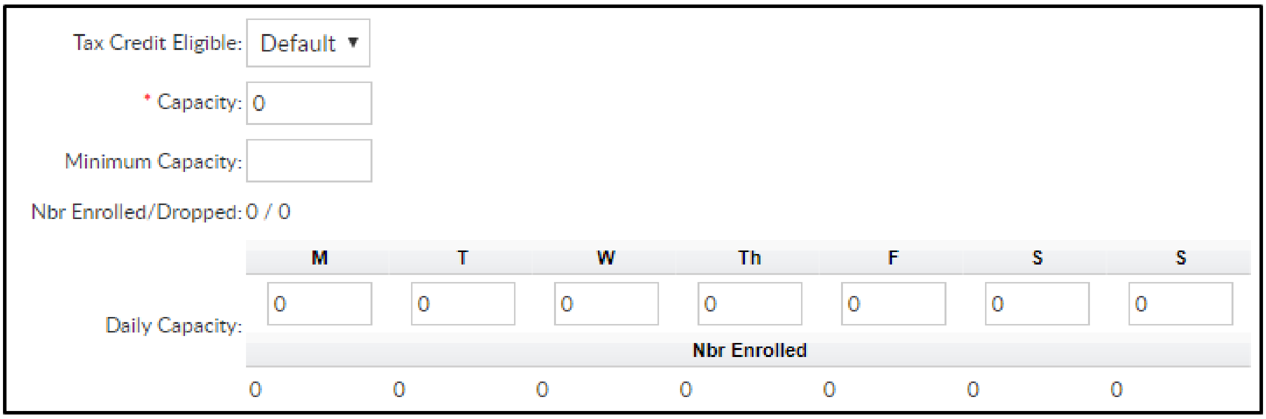
Location:

Gender Restriction: Select Restriction

Grade From: N/A

Grade To: N/A

- Location - enter specific location details, such as room name/number
- Gender Restrictions - if there is a restriction on gender, select the correct option (All Allowed, Female Only, Male Only)
- Grade From - if there is a grade restriction, select the lowest grade here
- Grade To - if there is a grade restriction, select the highest grade here
- Tax Credit Eligible - this will mostly be for states that allow families to make contributions to schools and non-profit organizations, and then receive that money as a direct credit (not just a deduction) at the time income taxes are filed- additional setup may be needed for this to work properly



Tax Credit Eligible: Default

* Capacity: 0

Minimum Capacity:

Nbr Enrolled/Dropped: 0 / 0

Daily Capacity:

M	T	W	Th	F	S	S
0	0	0	0	0	0	0

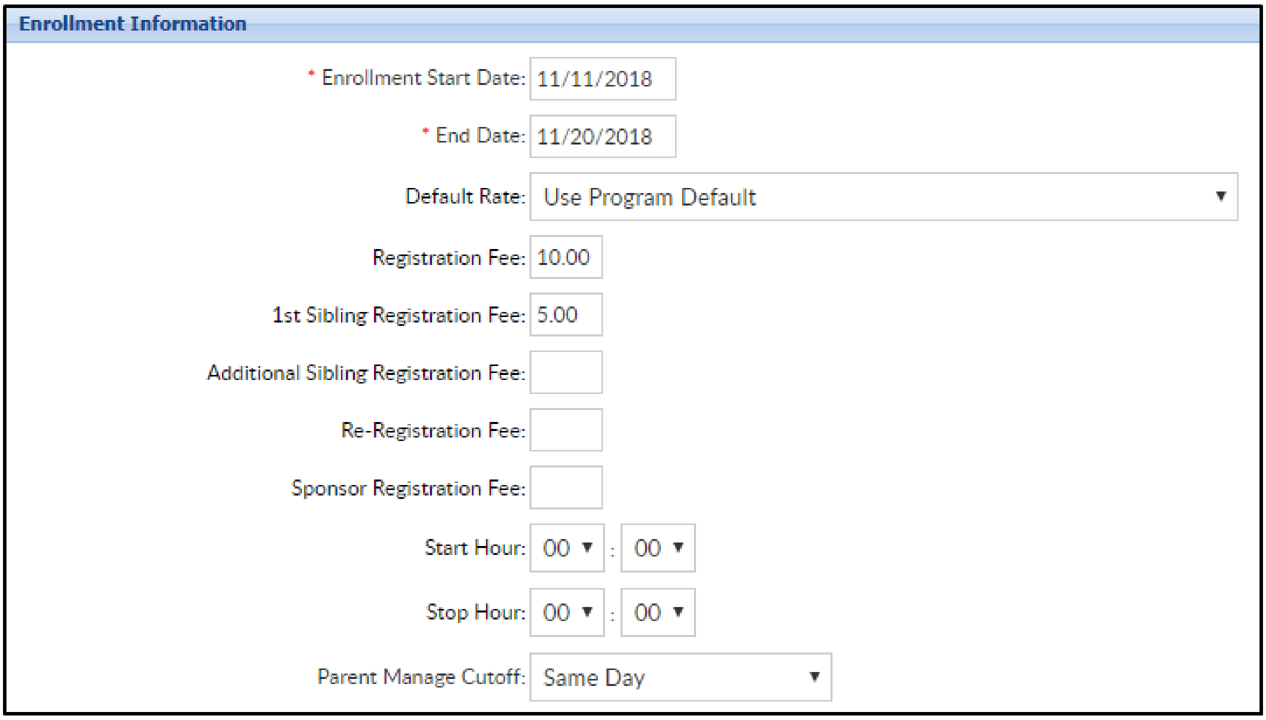
Nbr Enrolled

0	0	0	0	0	0	0

- Capacity - enter the maximum number of students that can register
- Minimum Capacity - this is an informational field that will display before families registers
- Nbr Enrolled/Dropped - this will display the number of enrolled and dropped

  students once registration has begun
  - Daily Capacity - if capacity is based on the day of the week, enter the daily capacity under the correct day in the chart

- Enrollment Information
  - Enrollment Start Date - select the registration start date from the calendar



Enrollment Information

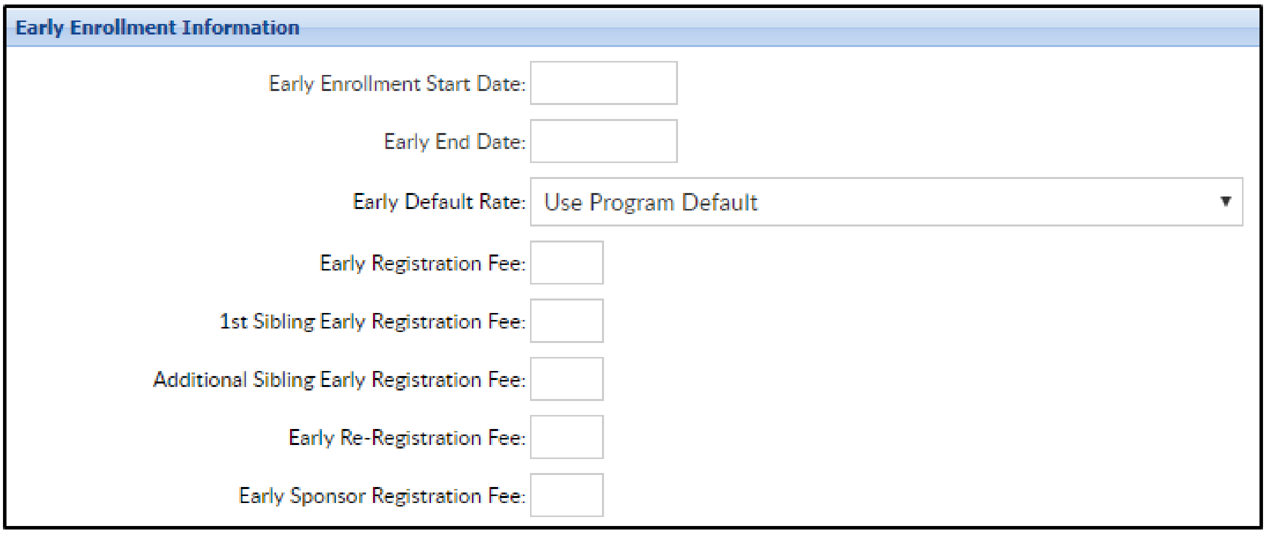
* Enrollment Start Date: 11/11/2018
* End Date: 11/20/2018
Default Rate: Use Program Default
Registration Fee: 10.00
1st Sibling Registration Fee: 5.00
Additional Sibling Registration Fee:
Re-Registration Fee:
Sponsor Registration Fee:
Start Hour: 00 : 00
Stop Hour: 00 : 00
Parent Manage Cutoff: Same Day

  - End Date - select the registration end date from the calendar
  - Default Rate - select the rate that should be associated with the room/program. Click here to setup rates . If Use Program Default is selected, it will pull the rate from the room setup
  - Registration Fee - the cost of registration for the first student.Click here to see registration fee examples
  - 1st Sibling Registration Fee - the cost of registration for the first sibling (2nd student), if applicable
  - Additional Sibling Registration Fee - the cost of registration for any additional siblings (after the first 2 students), if applicable
  - Re-Registration Fee - the cost if a child is registering again for a semester they were previously enrolled in
  - Sponsor Registration Fee - the cost if a sponsored student registers. Please Note: This requires extra setup

  - Start Hour- the hour registration will start
  - Stop Hour- the hour registration will end
  - Parent Manage Cutoff - the day parents will no longer be able to select a day from a parent managed calendar
    - Available choices: Not Applicable, Same Day, Day Prior, Week Prior - day of the week

---

- Early Enrollment Information
  - Early Enrollment Start Date - select the start date for early enrollment, if applicable



Early Enrollment Information

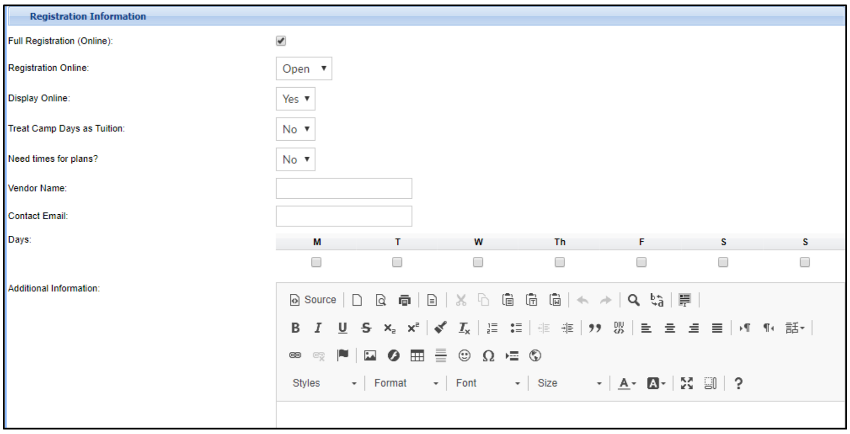
Early Enrollment Start Date:
Early End Date:
Early Default Rate: Use Program Default
Early Registration Fee:
1st Sibling Early Registration Fee:
Additional Sibling Early Registration Fee:
Early Re-Registration Fee:
Early Sponsor Registration Fee:

  - Early Enrollment End Date - select the end date for early enrollment, if applicable
  - Early Default Rate - the student rate if registered in early enrollment
  - Early Registration Fee - the cost of registration for the first student during early enrollment. Click here to see registration fee examples
  - Early 1st Sibling Registration Fee - the cost of registration for the first sibling (2nd student) during the early enrollment period
  - Early Additional Sibling Registration Fee - the cost of registration for any additional siblings during early enrollment
  - Early Re-Registration Fee- the cost if a child is registering again for a semester they were previously enrolled in during the early enrollment period
  - Early Sponsor Registration Fee - the cost if a sponsored student registers

during early enrollment

- Registration Bundle
    - Bundle Program
    - Bundle Semester

- Registration Information
    - Full Registration (Online) - check this box if new and existing students should be able to register online
    - Registration Online - choose Open or Closed to open/close registration online. **Recommended Setting**: choose Open if online registration will take place at some point



Registration Information

Full Registration (Online): ☑

Registration Online: Open

Display Online: Yes

Treat Camp Days as Tuition: No

Need times for plans? No

Vendor Name:

Contact Email:

Days:

M	T	W	Th	F	S	S
☐	☐	☐	☐	☐	☐	☐

Additional Information:

-
    - Display Online - choose yes or no to display this program online. **Recommended Setting**: choose Yes if online registration will take place at some point
    - Treat Camp Days as Tuition
    - Need Times for Plans
    - Vendor Name - if the program is being hosted by a 3rd party or separate vendor, place the name of the vendor in this field
    - Contact Email (does this go with vendor?) - if emails should go to a specific person for the room/semester association enter the email in this field
    - Days - select the days the program will meet for the semester
    - Additional Information - this is a legacy field that no longer displays on new registration pages
    - Center List - once the information is saved for the first time, navigate back to this screen. Scroll to the bottom and select which centers the

room/semester association should apply to

  - **Please Note**: for single-center sites, this will default automatically. If no centers are selected, registration will not display for the room/program

Room/Program- (View Semester), Availability/Camp Days

Last Modified on 06/19/2018 8:16 pm EDT

Field trips can be associated to classrooms at a center level. This process can also be used to setup camp days for a classroom. Be sure you are at a center level when adding field trip days rather than at the business level.

Then go to Setup > Room, select the View Semester Link for a specific room, select the semester- then select the Availability/Camp Days link.

Setup -> *AM, Before School Care* -> Semester

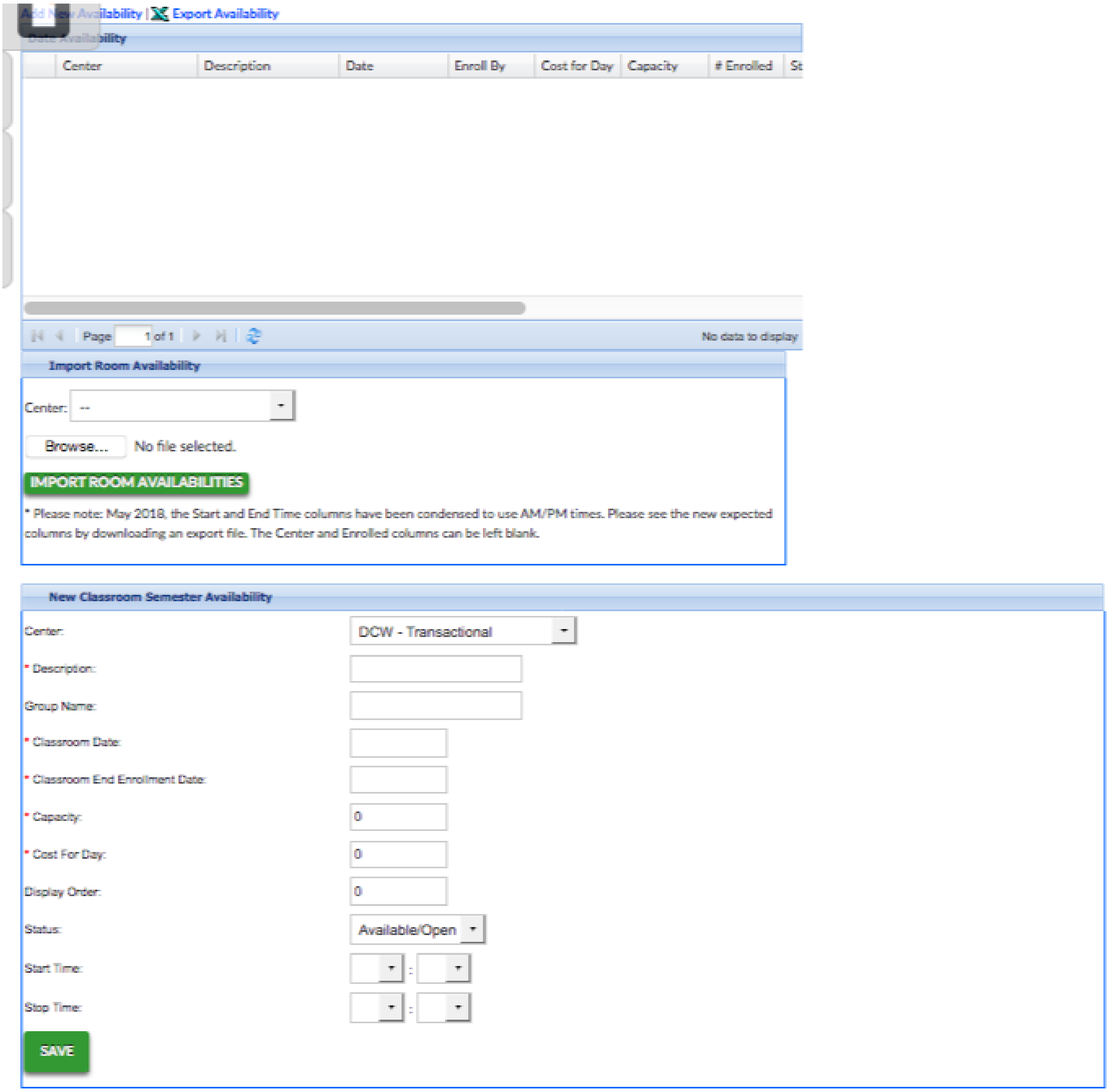
Semester Information: AM, Before School Care

Semester: * 18-19 School Aged Child Care

Semester is assigned (Availability/Camp Days) (Registration Setup) (Registration Exceptions) (Plan Options)

Any days that have already been added for the room/program and semester pairing will display in the top box.

To add new availability dates scroll to the New Classroom Semester Availability section and select the center, enter a description of the day, the date, the last day the day could be selected, capacity, cost for the day, display order, if the program is open/closed and the times for the program. Press Save to complete.



Center	Description	Date	Enroll By	Cost for Day	Capacity	# Enrolled	St

Import Room Availability

Center: --

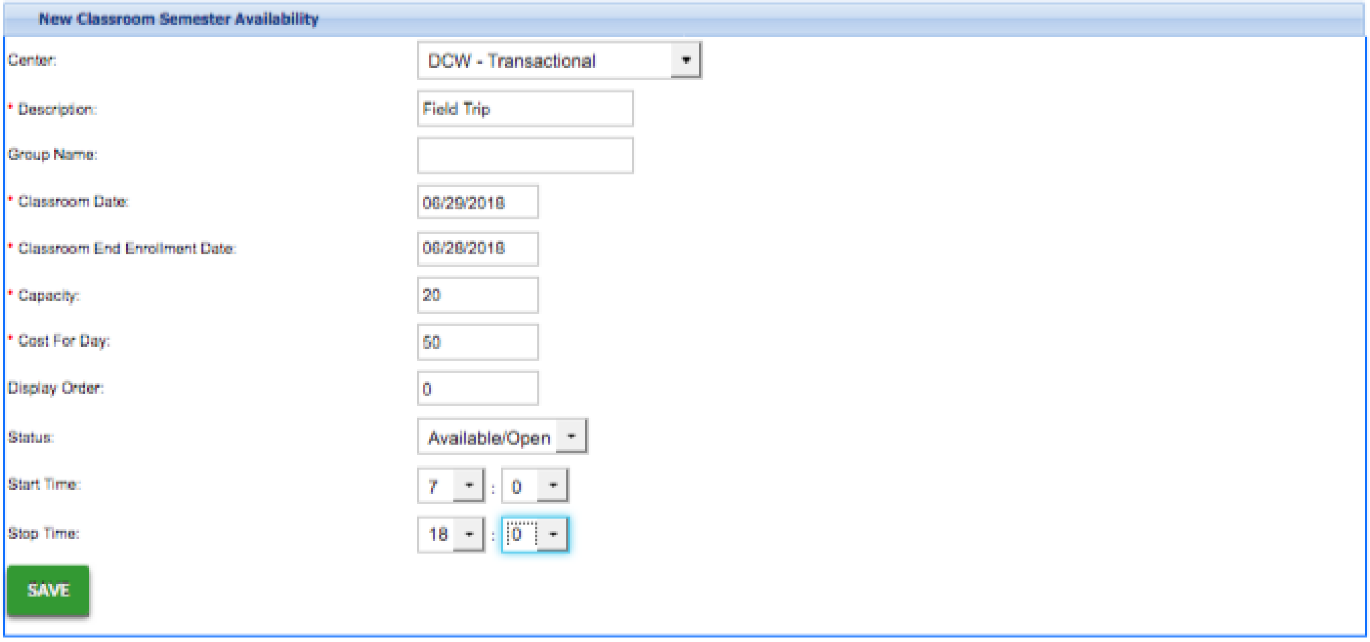
No file selected.

* Please note: May 2018, the Start and End Time columns have been condensed to use AM/PM times. Please see the new expected columns by downloading an export file. The Center and Enrolled columns can be left blank.

New Classroom Semester Availability

Center:	DCW - Transactional
* Description:	
Group Name:	
* Classroom Date:	
* Classroom End Enrollment Date:	
* Capacity:	0
* Cost For Day:	0
Display Order:	0
Status:	Available/Open
Start Time:	:
Stop Time:	:

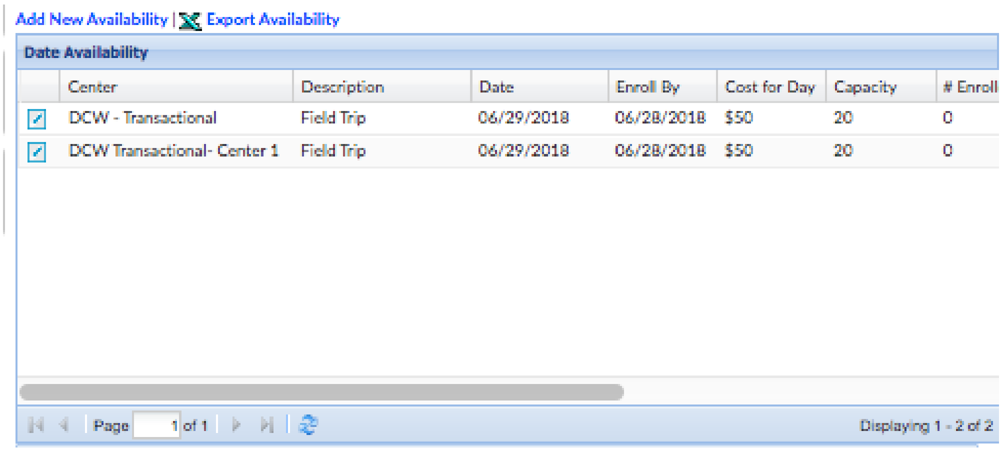
Example- The name of the day would be "Field Trip", the program would take place on 6/29/18 but people would have to sign up by 6/28/19. 20 Children could enroll at a cost of $50.00 per day. The Program is open and will run from 7 AM to 6 PM.



New Classroom Semester Availability

Center:	DCW - Transactional
* Description:	Field Trip
Group Name:	
* Classroom Date:	06/29/2018
* Classroom End Enrollment Date:	06/28/2018
* Capacity:	20
* Cost For Day:	50
Display Order:	0
Status:	Available/Open
Start Time:	7 : 0
Stop Time:	18 : 0

Once Save is selected the detail will display in the top box.



Date Availability

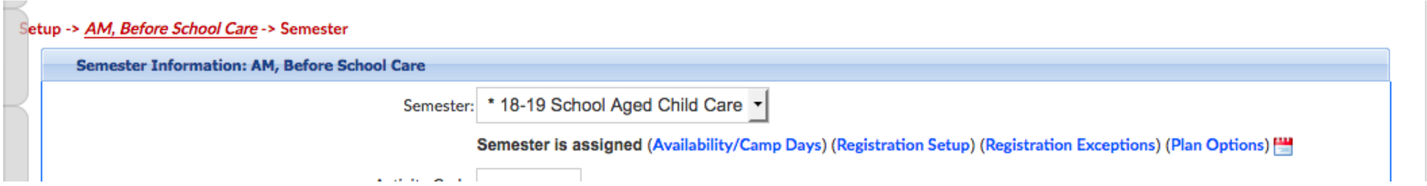
	Center	Description	Date	Enroll By	Cost for Day	Capacity	# Enroll
✎	DCW - Transactional	Field Trip	06/29/2018	06/28/2018	$50	20	0
✎	DCW Transactional- Center 1	Field Trip	06/29/2018	06/28/2018	$50	20	0

Room/Program- (View Semester), Registration Setup

Last Modified on 06/19/2018 8:23 pm EDT

The registration setup option under the semester allows administrators to setup prerequisites for particular room/semester associations.

Go to Setup > Room, select the View Semester Link for a specific room, select the semester- then select the Registration Setup link.



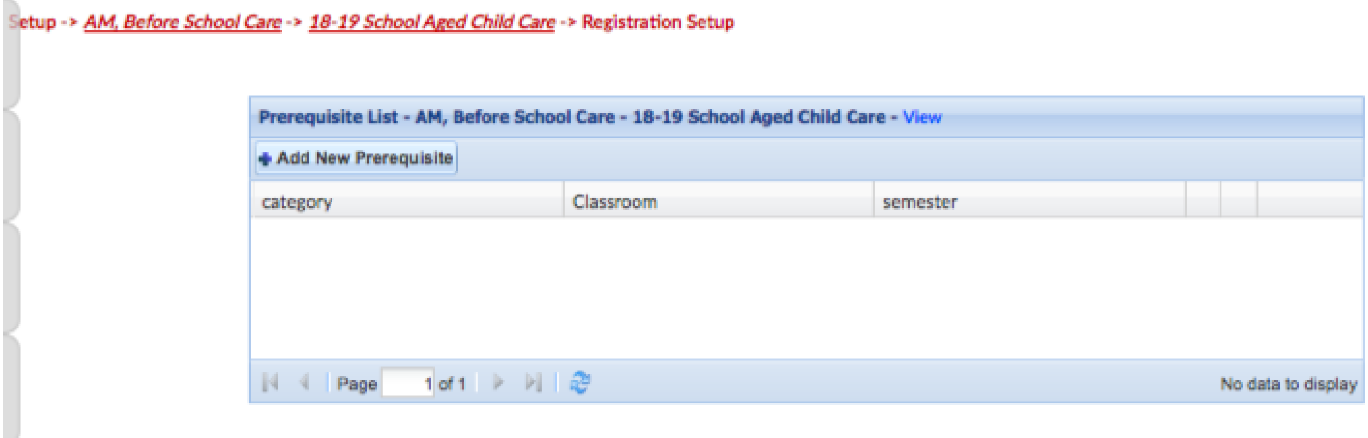
Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: * 18-19 School Aged Child Care

Semester is assigned (Availability/Camp Days) (Registration Setup) (Registration Exceptions) (Plan Options)

On the Registration Setup link, select the +Add New Prerequisite icon



Setup -> AM, Before School Care -> 18-19 School Aged Child Care -> Registration Setup

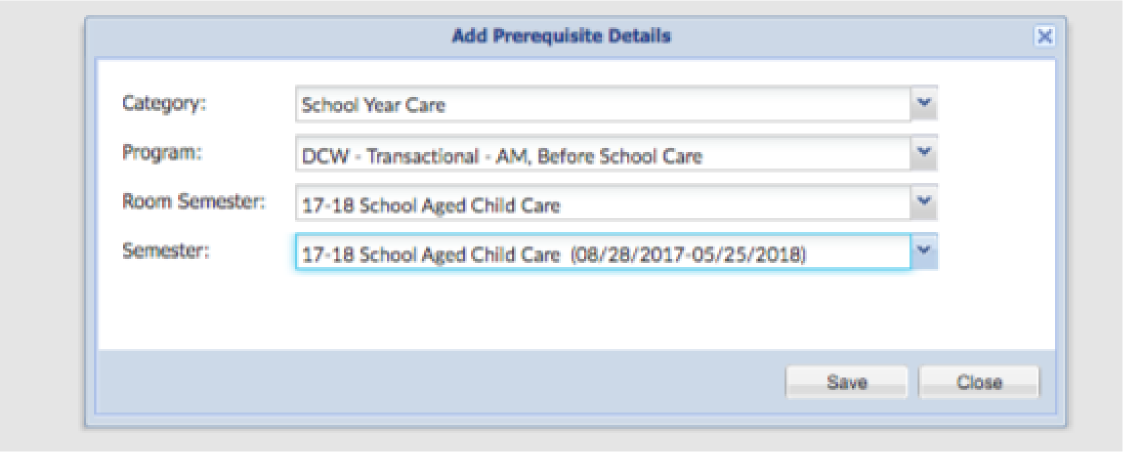
Prerequisite List - AM, Before School Care - 18-19 School Aged Child Care - View

category	Classroom	semester

Page 1 of 1

No data to display

Enter detail, then press Save.



Add Prerequisite Details

Category: School Year Care

Program: DCW - Transactional - AM, Before School Care

Room Semester: 17-18 School Aged Child Care

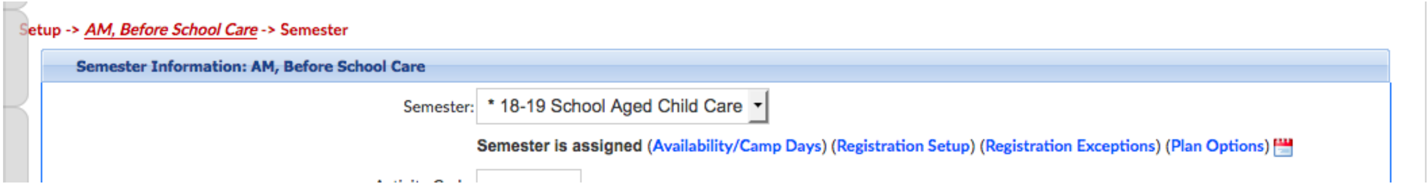
Semester: 17-18 School Aged Child Care (08/28/2017-05/25/2018)

Room/Program- (View Semester), Registration Exceptions

Last Modified on 06/19/2018 8:32 pm EDT

The registration exceptions section allows centers to setup exceptions for registration fees for parents or families, allowing those families to register for a discounted or free rate. Discount Code is a Valid Value and must be setup in the Valid Value section. The semester must also be assigned to a classroom prior to setting up the registration exceptions.

Go to Setup > Room, select the View Semester Link for a specific room, select the semester- then select the Registration Exceptions link.



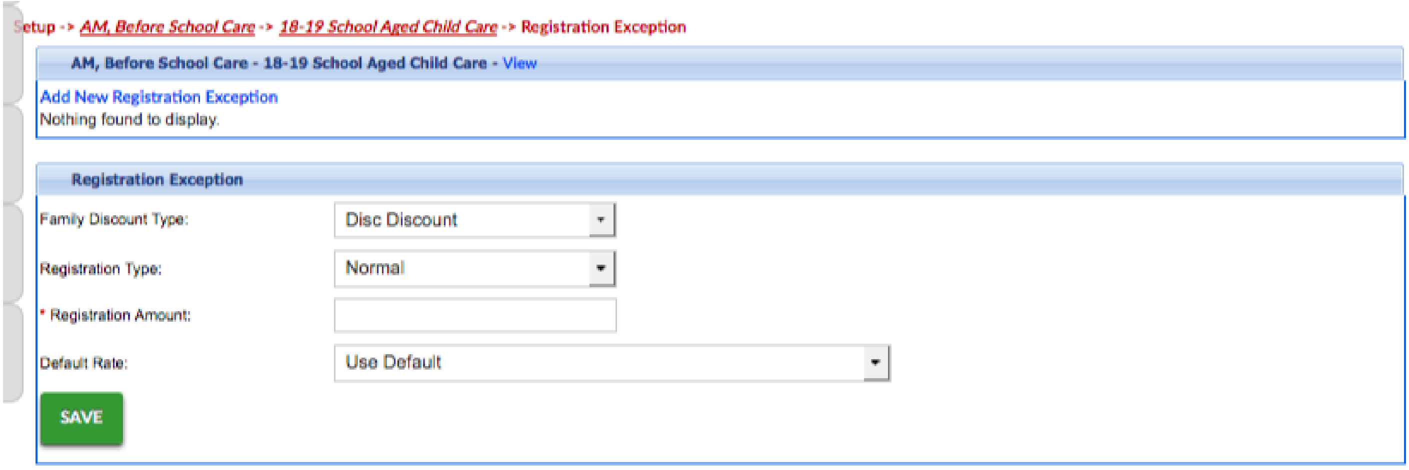
Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: * 18-19 School Aged Child Care

Semester is assigned (Availability/Camp Days) (Registration Setup) (Registration Exceptions) (Plan Options)

Select the discount the exception should apply to, if the exception should apply to normal or early registrations, the cost of registration and the default rate that should apply to the child's program/room assignment.



Setup -> AM, Before School Care -> 18-19 School Aged Child Care -> Registration Exception

AM, Before School Care - 18-19 School Aged Child Care - View

Add New Registration Exception

Nothing found to display.

Registration Exception

Family Discount Type: Disc Discount

Registration Type: Normal

* Registration Amount:

Default Rate: Use Default

Room/Program - (View Semester), Plan Options

Last Modified on 01/04/2019 11:09 am EST

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

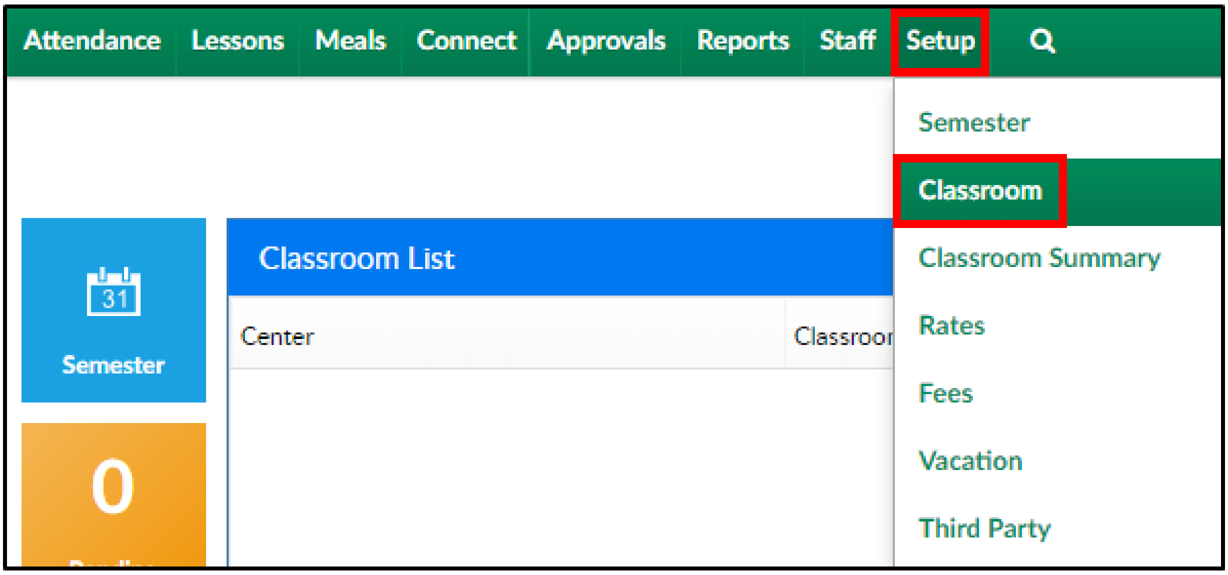
For example, if a site has a program that allows students to attend a specific set of days, each of the below would be setup as a plan option under the room.

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

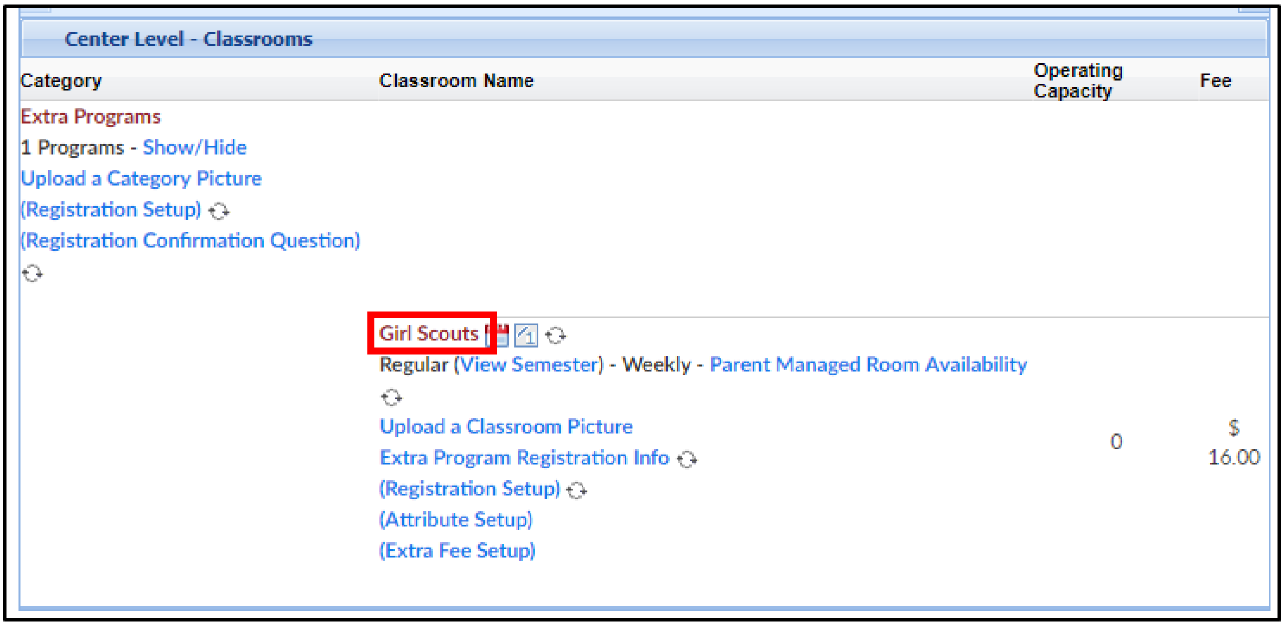
Room Configuration

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



Center Level - Classrooms

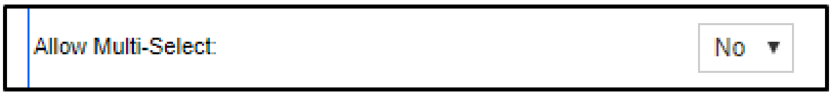
Category	Classroom Name	Operating Capacity	Fee
Extra Programs 1 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	Girl Scouts Regular (View Semester) - Weekly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 16.00

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

---

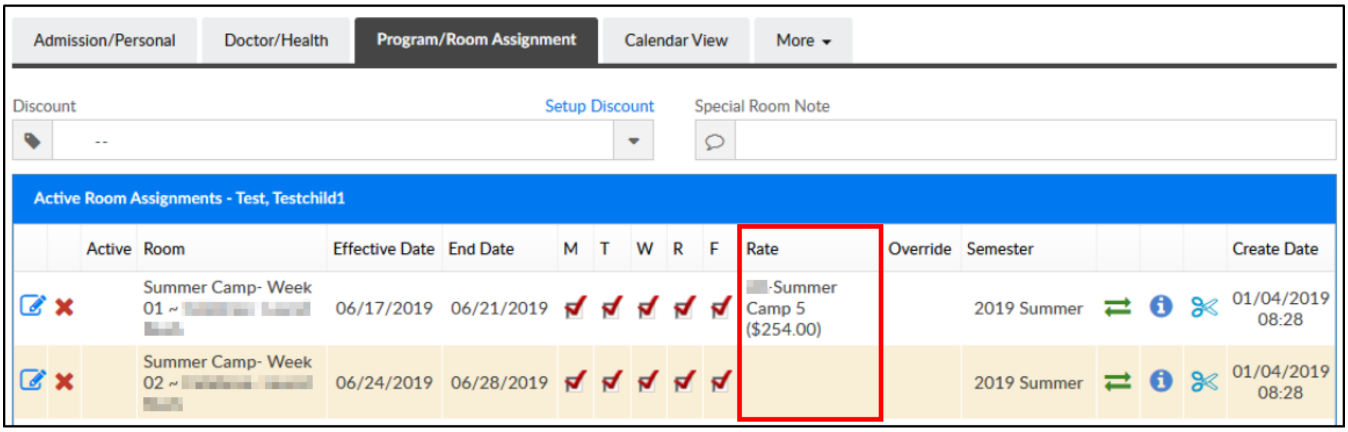
Category Configuration

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



Allow Multi-Select: No

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



Discount: --

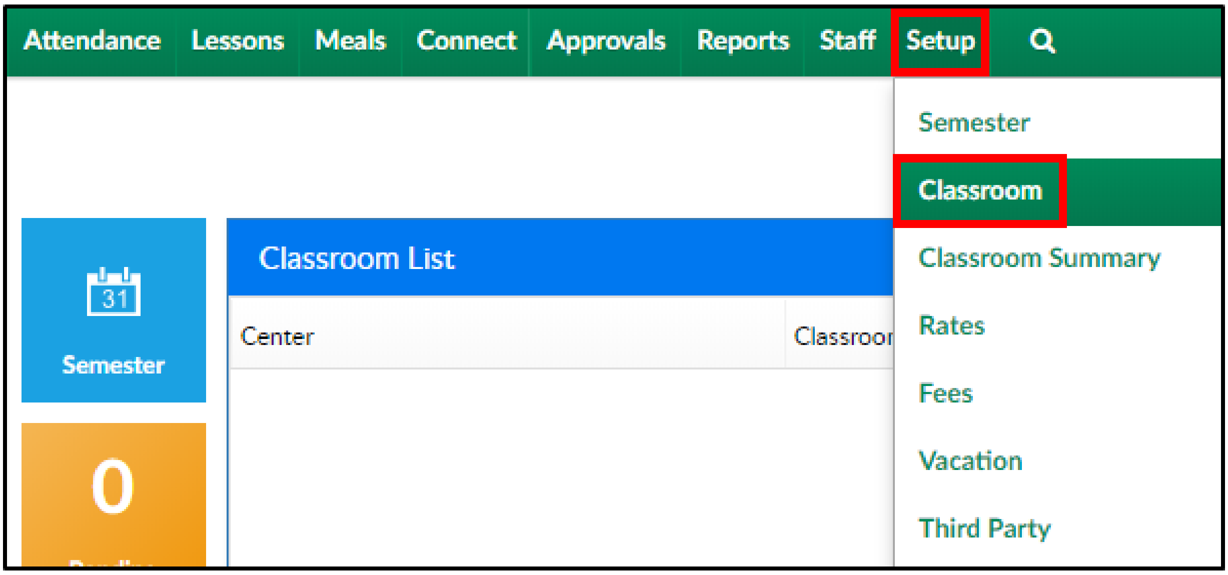
Special Room Note:

Active Room Assignments - Test, Testchild1

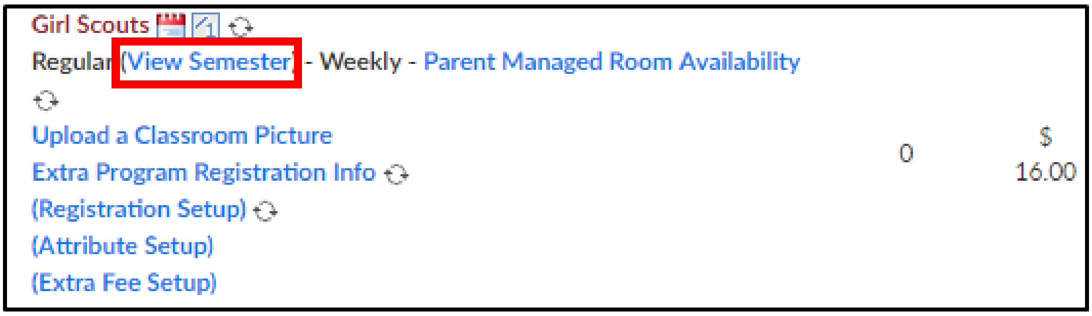
	Active	Room	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester		Create Date
		Summer Camp- Week 01 ~ [redacted]	06/17/2019	06/21/2019	✓	✓	✓	✓	✓	[redacted]-Summer Camp 5 ($254.00)		2019 Summer		01/04/2019 08:28
		Summer Camp- Week 02 ~ [redacted]	06/24/2019	06/28/2019	✓	✓	✓	✓	✓			2019 Summer		01/04/2019 08:28

Creating Plan Options

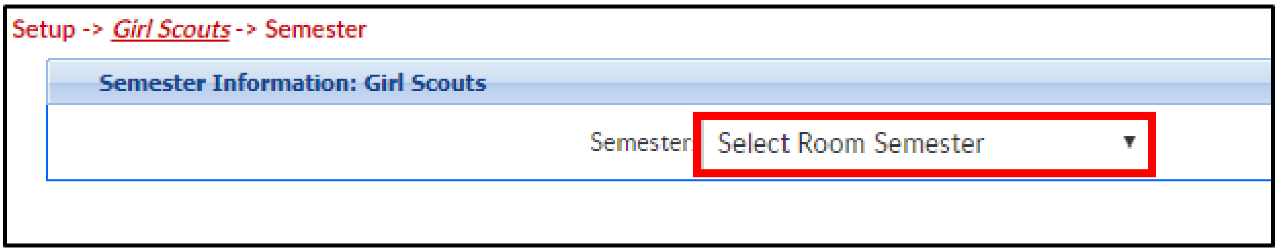
1. Choose Setup from the menu bar, then select Classroom



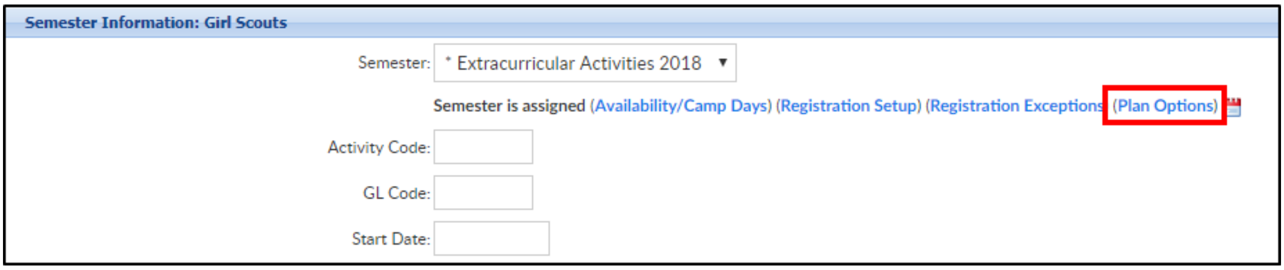
2. Locate the room/program to add Plan Options to and Click View Semester



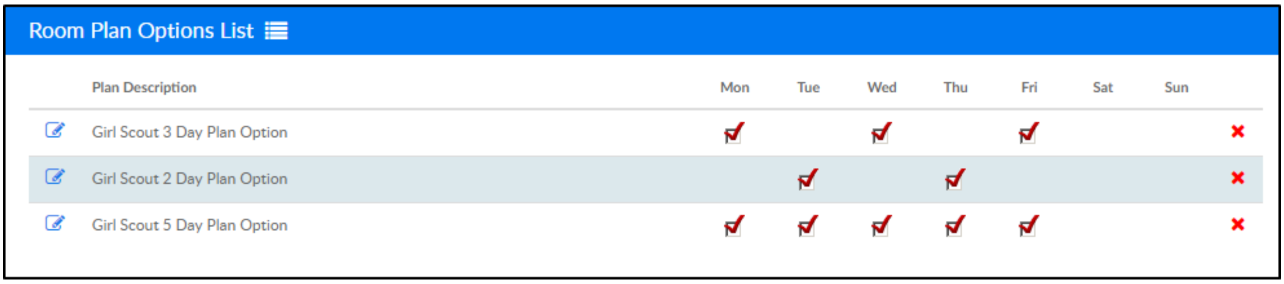
3. Choose the Semester from the drop-down menu



4. Click Plan Options



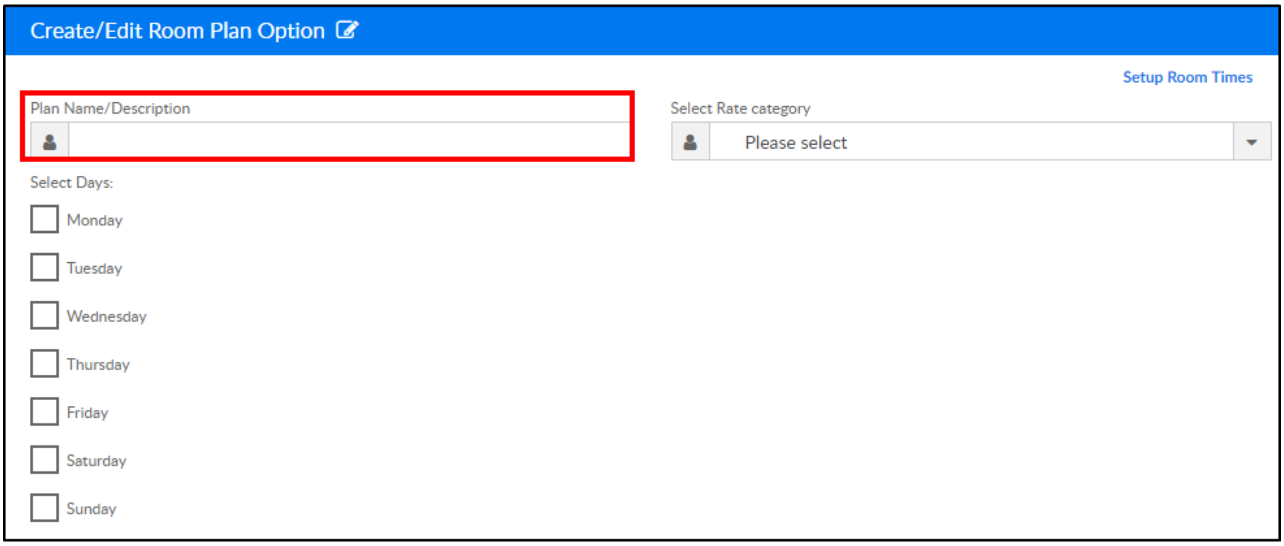
5. Existing Plan Options will be listed under the Room Plan Options List section. Please be aware, plans are listed in the order they are added



Room Plan Options List

	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: Please select

Select Days:

☐ Monday

☐ Tuesday

☐ Wednesday

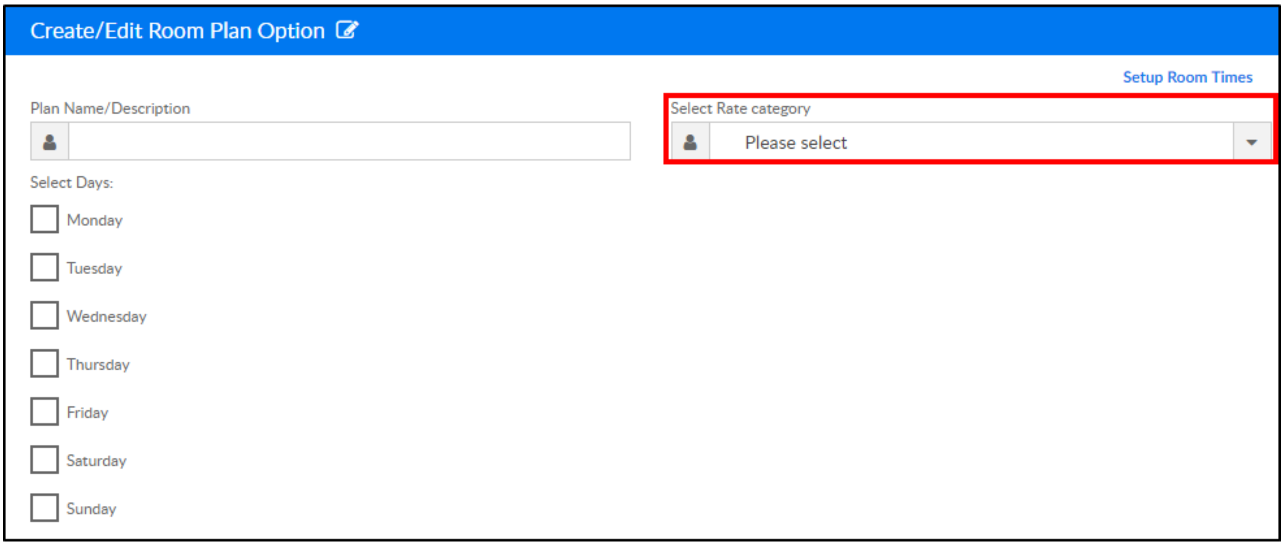
☐ Thursday

☐ 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: Please select

Select Days:

☐ Monday

☐ Tuesday

☐ Wednesday

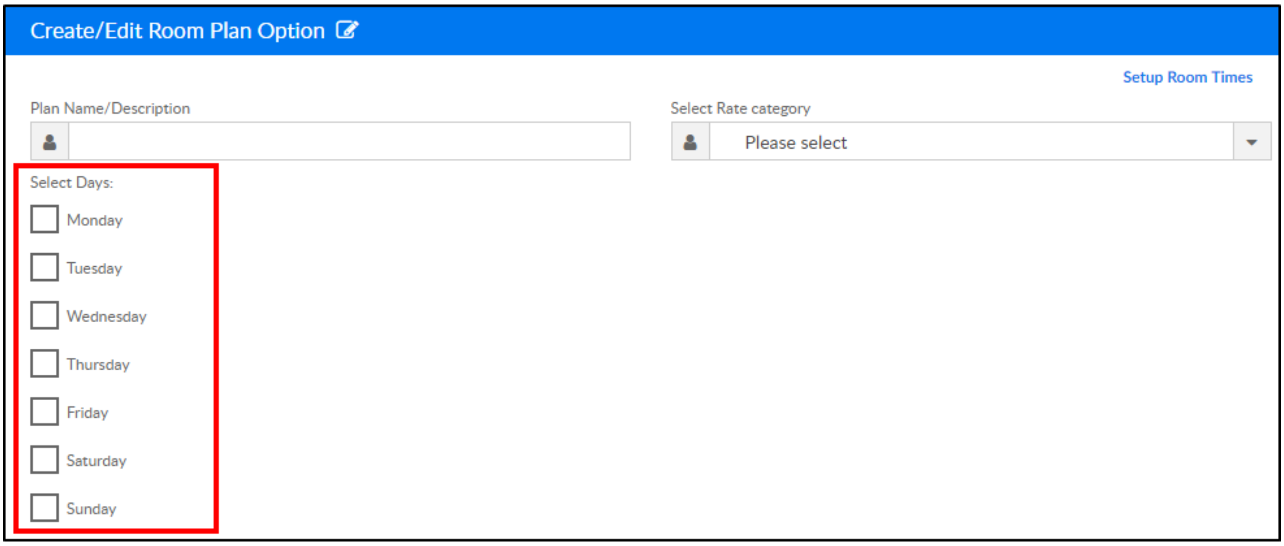
☐ Thursday

☐ Friday

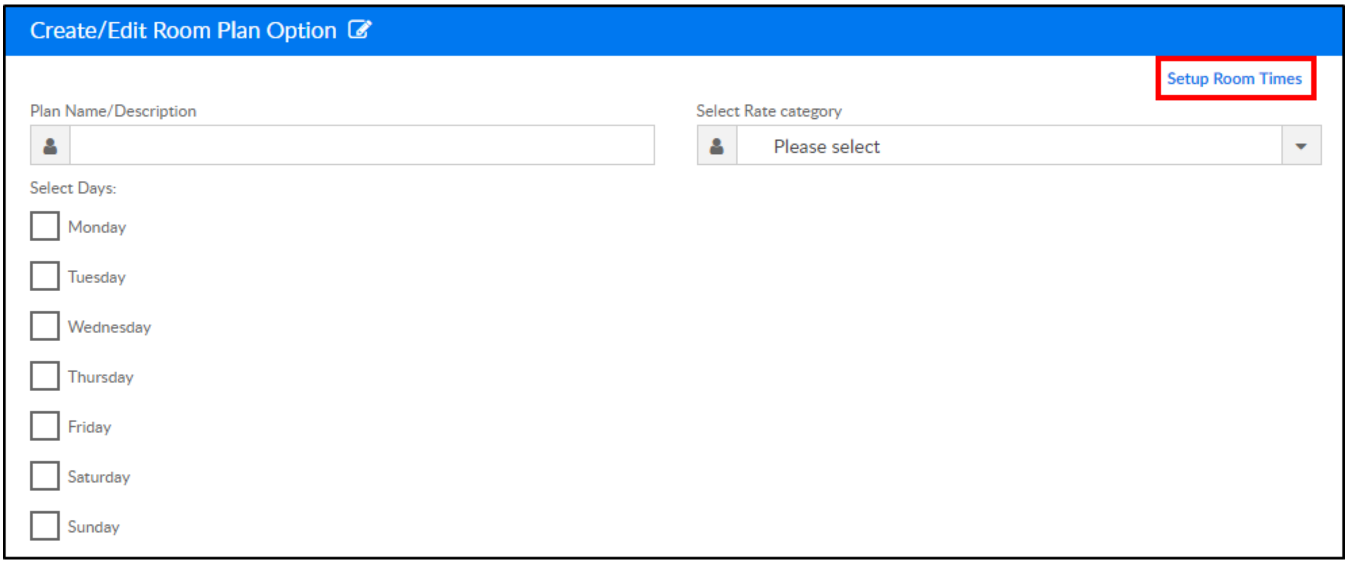
☐ Saturday

☐ Sunday

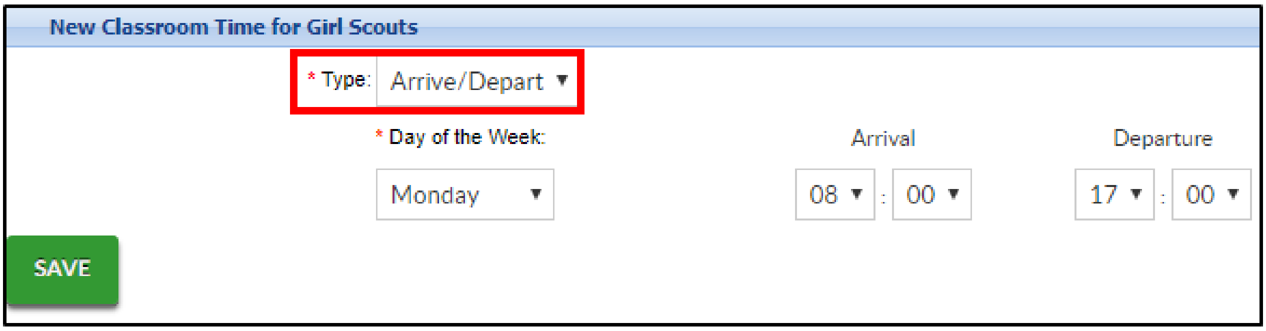
9. Choose the days to add to the plan option



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



    - Type - choose Arrive/Depart



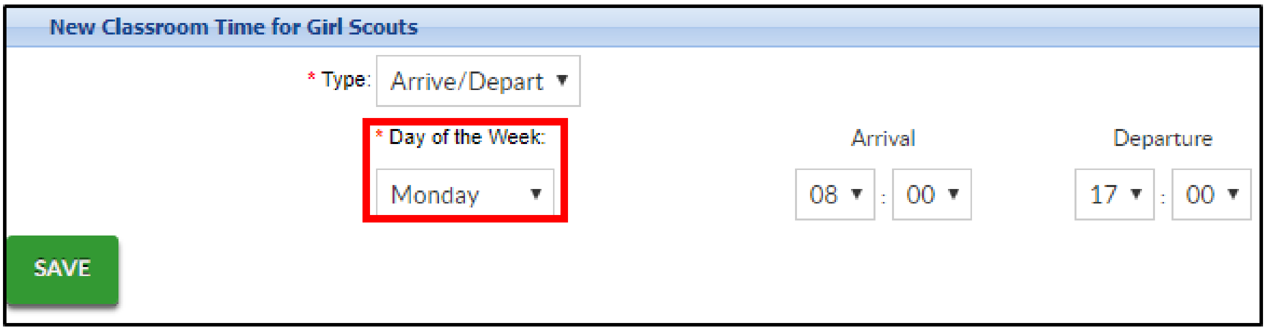
* Type: Arrive/Depart

* Day of the Week: Monday

Arrival 08 : 00

Departure 17 : 00

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


New Classroom Time for Girl Scouts

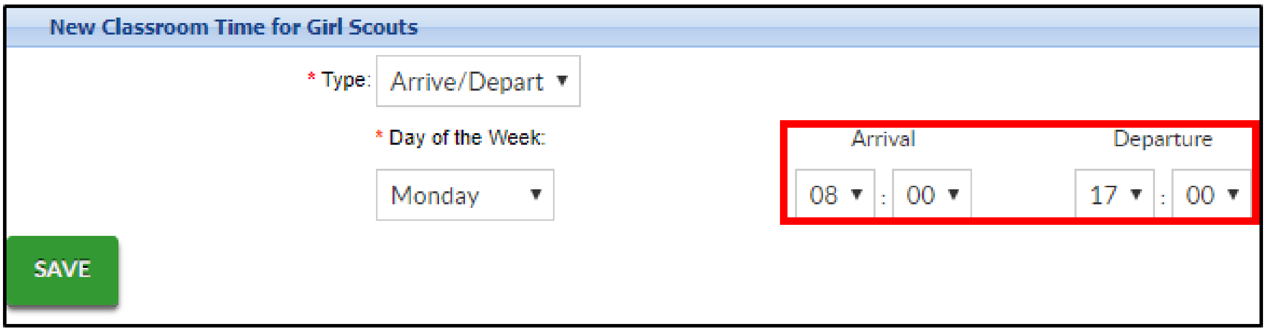
* Type: Arrive/Depart

* Day of the Week: Monday

Arrival 08 : 00

Departure 17 : 00

- Arrival/Departure - select the arrival and departure times


New Classroom Time for Girl Scouts

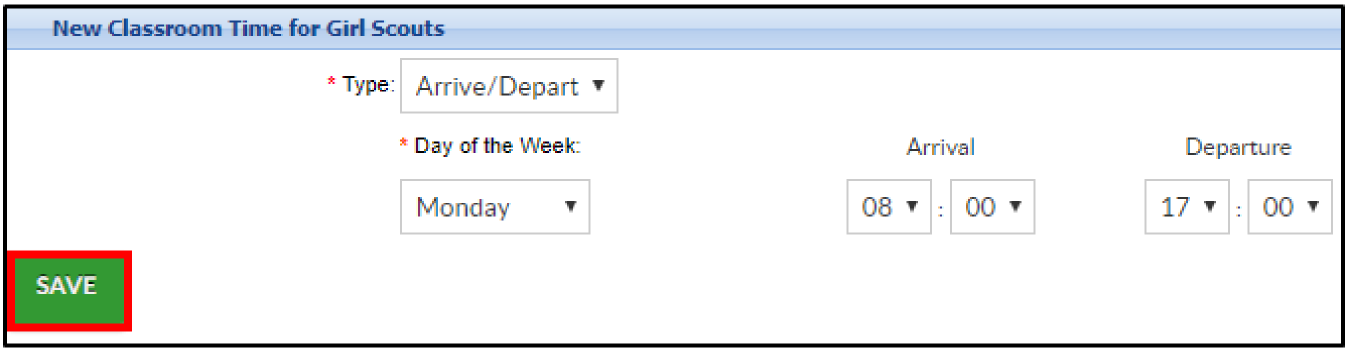
* Type: Arrive/Depart

* Day of the Week: Monday

Arrival 08 : 00

Departure 17 : 00

11. Click Save


New Classroom Time for Girl Scouts

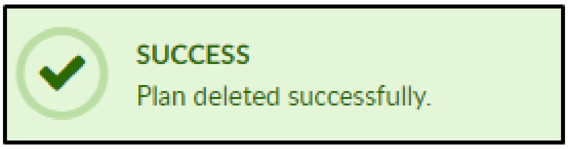
* Type: Arrive/Depart

* Day of the Week: Monday

Arrival 08 : 00

Departure 17 : 00

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


SUCCESS

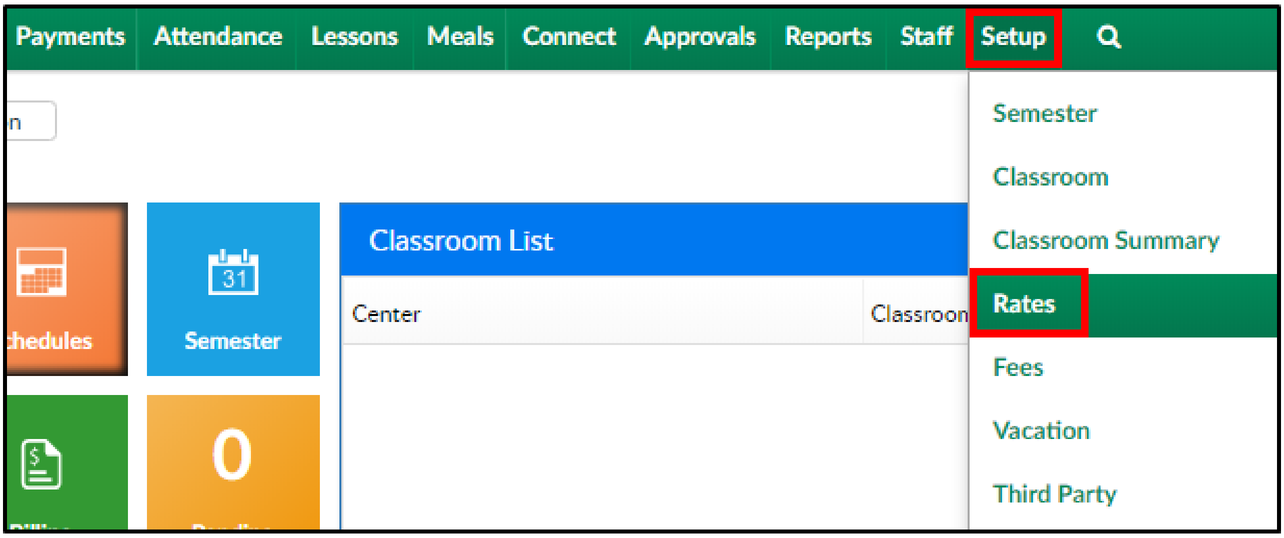
Plan deleted successfully.

Setting Up Rate Categories

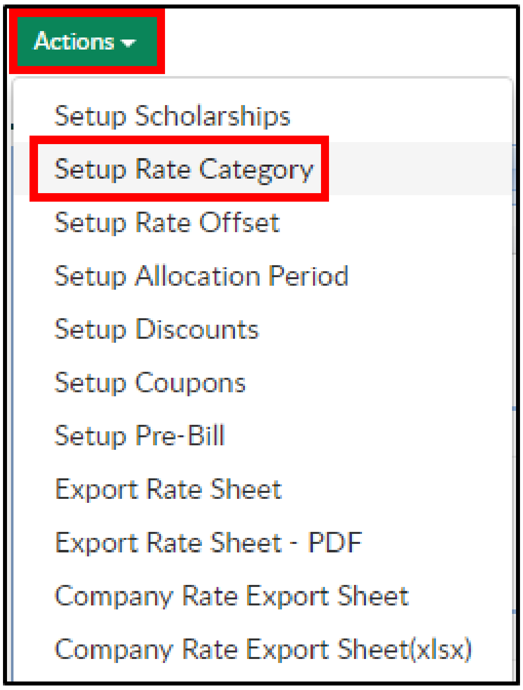
Each rate must be added to a unique Accounting Group before the rate can be associated with a Plan Option. Each Accounting Group must only have one rate associated.

To add an Accounting Group, follow the steps below:

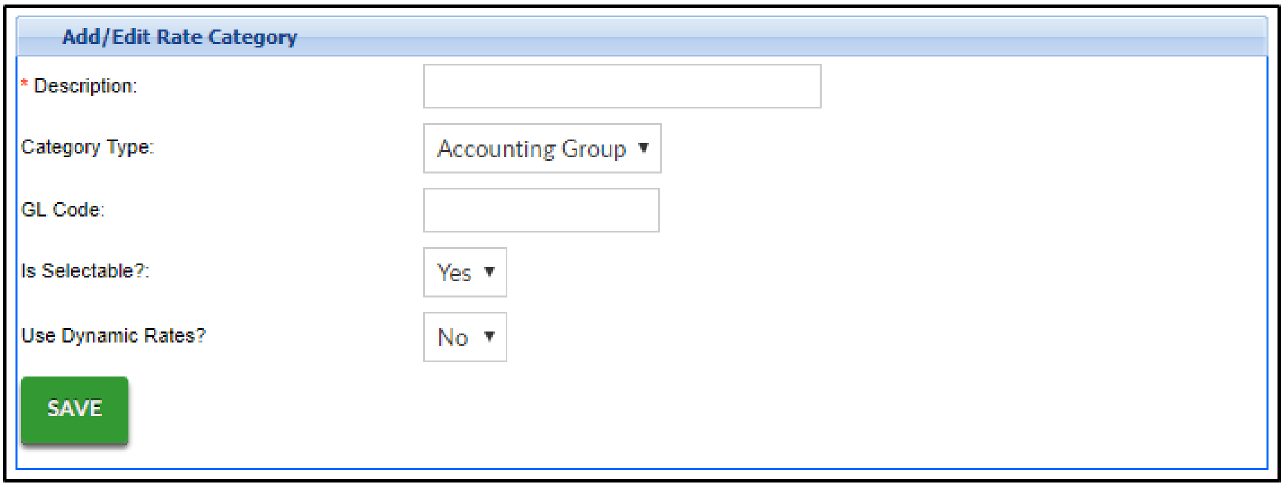
1. Click Setup from the menu, then select Rates



2. From the Actions menu, click Setup Rate Category



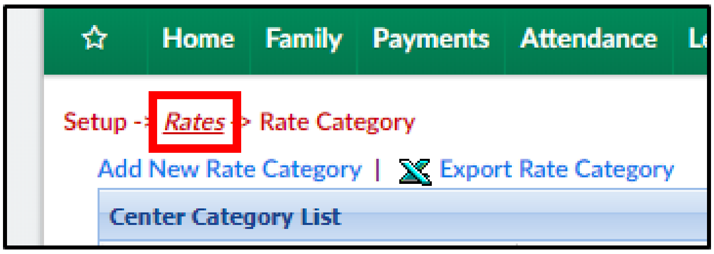
3. Complete the necessary fields in the Add/Edit Rate Category section


Add/Edit Rate Category

* Description:
Category Type: Accounting Group
GL Code:
Is Selectable?: Yes
Use Dynamic Rates? No

- 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

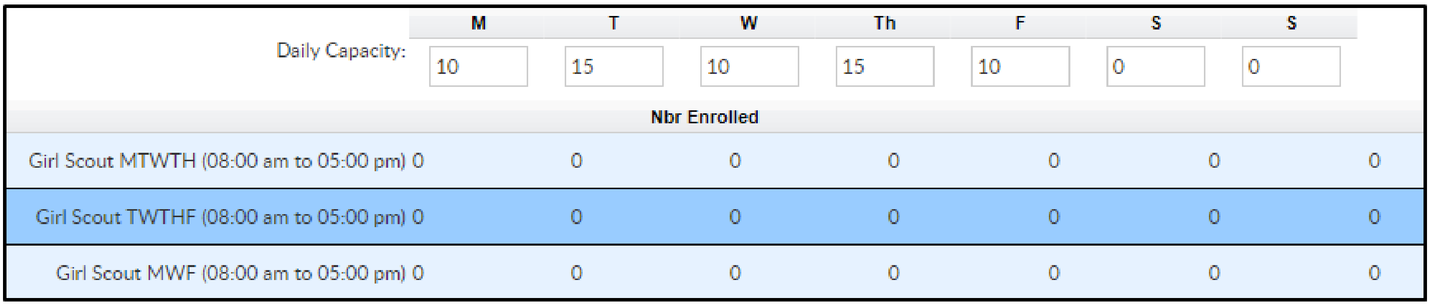
Active: Y
Category: CARE ALL DAY

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



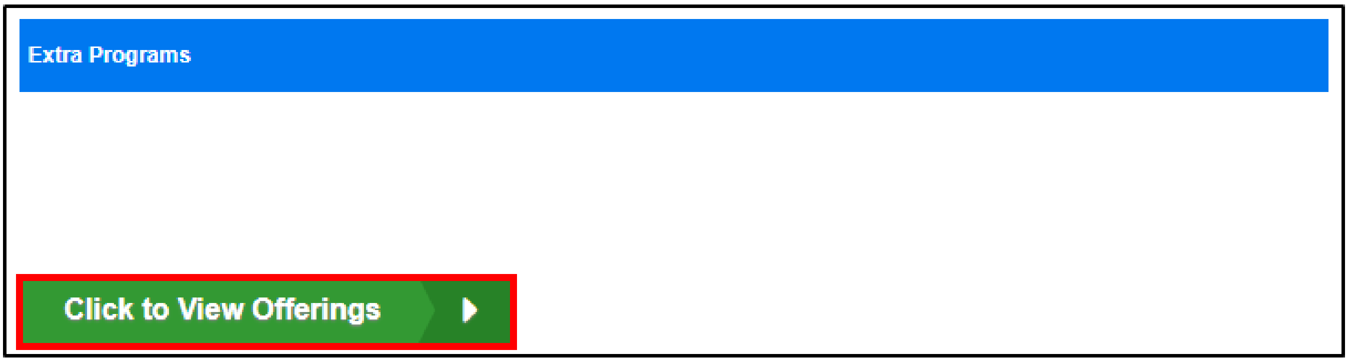
	M	T	W	Th	F	S	S
Daily Capacity:	10	15	10	15	10	0	0
Nbr Enrolled							
Girl Scout MTWTH (08:00 am to 05:00 pm)	0	0	0	0	0	0	0
Girl Scout TWTHF (08:00 am to 05:00 pm)	0	0	0	0	0	0	0
Girl Scout MWF (08:00 am to 05:00 pm)	0	0	0	0	0	0	0

Parent Portal View

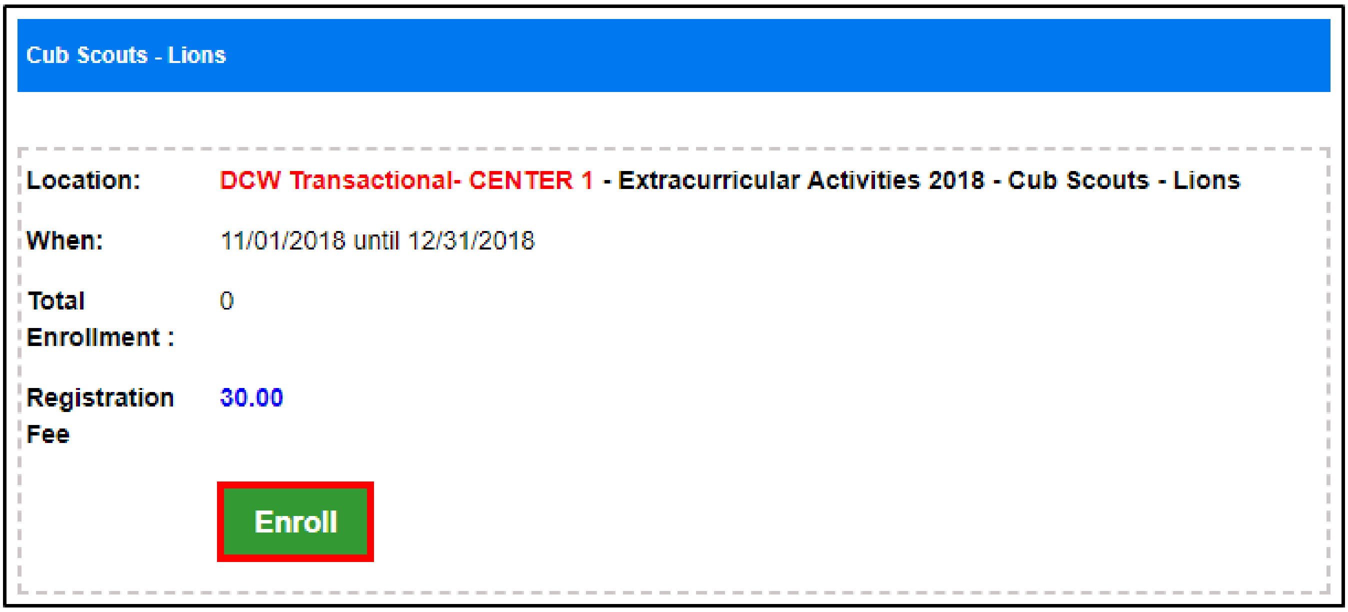
When parents are registering a student into a class with Plan Options, they will do the following:

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



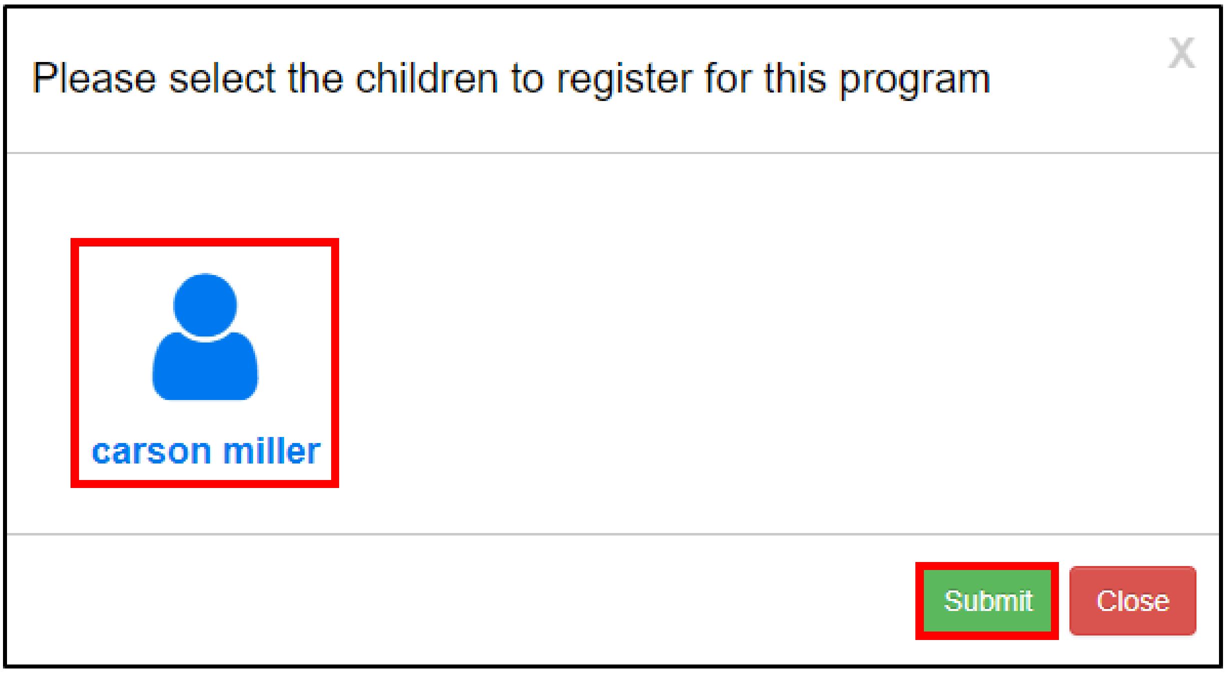
Location: DCW Transactional- CENTER 1 - Extracurricular Activities 2018 - Cub Scouts - Lions

When: 11/01/2018 until 12/31/2018

Total Enrollment : 0

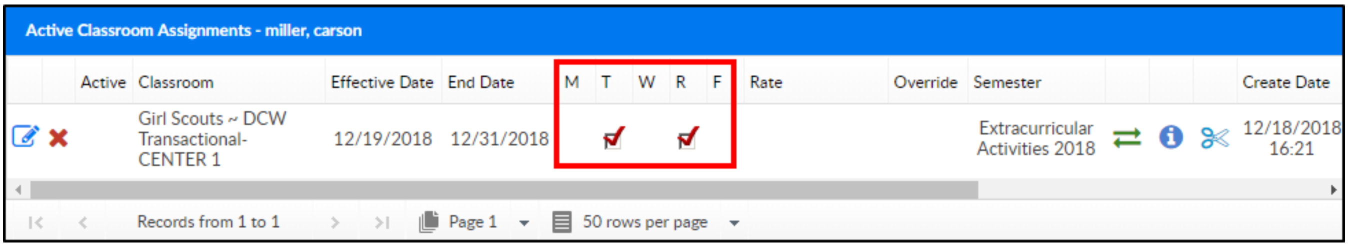
Registration Fee 30.00

5. Select the student and click Submit


Please select the children to register for this program

6. Select a plan from the drop-down menu

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

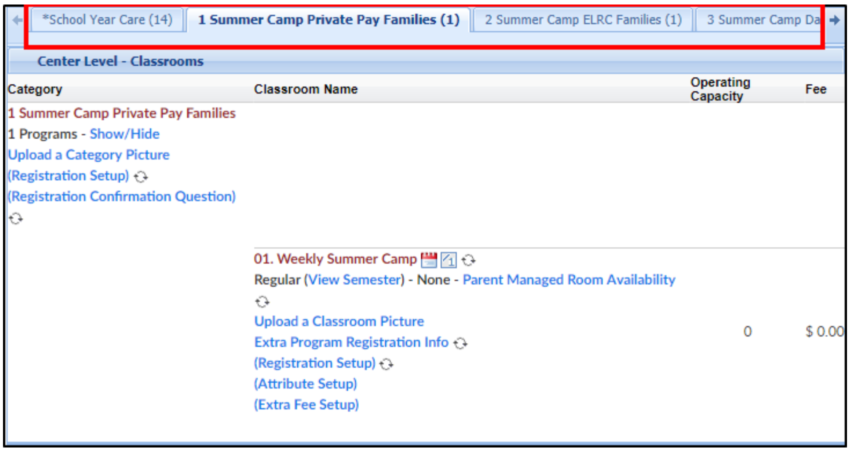
		Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester				Create Date
			Girl Scouts ~ DCW Transactional-CENTER 1	12/19/2018	12/31/2018		✓		✓				Extracurricular Activities 2018				12/18/2018 16:21

Setup > Room, Room/Program - Upload a Classroom Picture

Last Modified on 11/01/2018 2:24 pm EDT

A classroom image can be displayed during registration, to upload a classroom photo, follow the instructions below:

1. Navigate to the Setup screen, click Setup from the menu
2. Select Classroom
3. Select the correct Semester

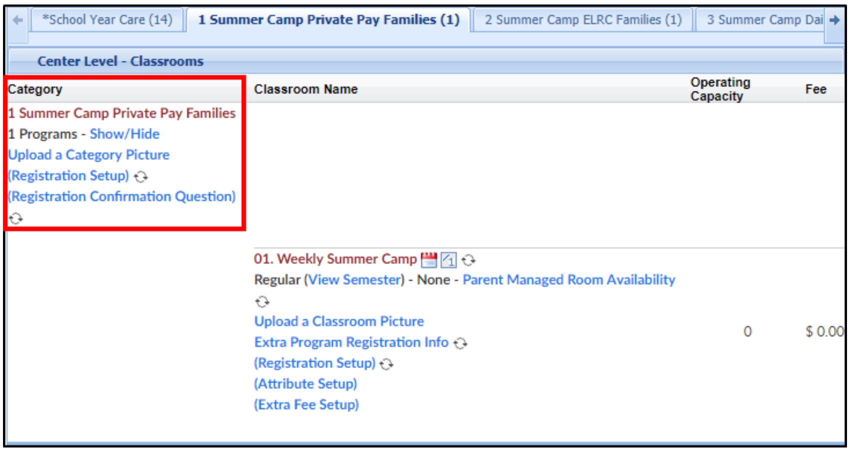


*School Year Care (14) | 1 Summer Camp Private Pay Families (1) | 2 Summer Camp ELRC Families (1) | 3 Summer Camp Da

Center Level - Classrooms

Category	Classroom Name	Operating Capacity	Fee
1 Summer Camp Private Pay Families 1 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	01. Weekly Summer Camp Regular (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

4. Locate the correct Category

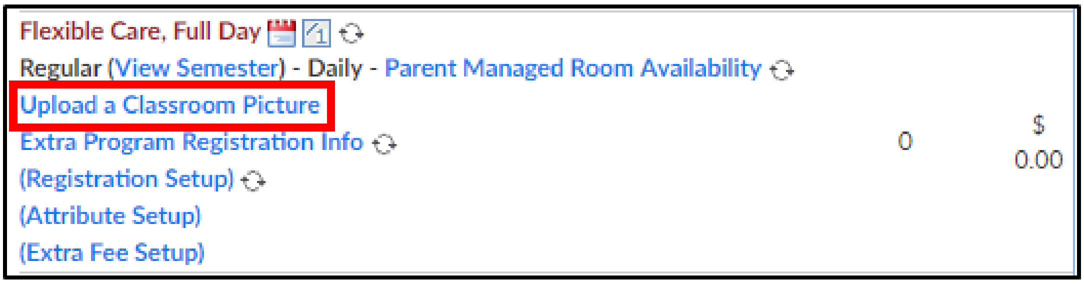


*School Year Care (14) | 1 Summer Camp Private Pay Families (1) | 2 Summer Camp ELRC Families (1) | 3 Summer Camp Dai

Center Level - Classrooms

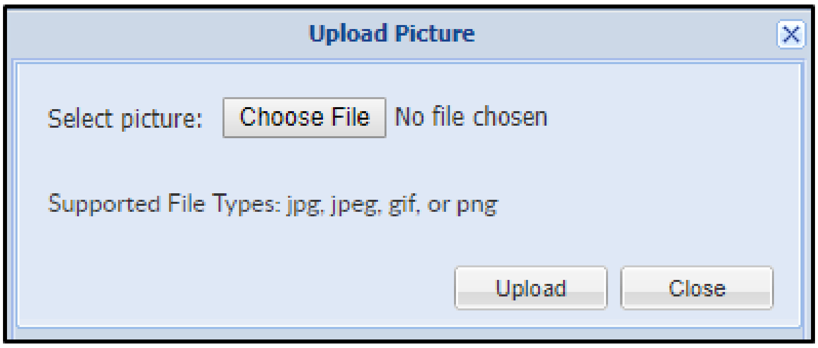
Category	Classroom Name	Operating Capacity	Fee
1 Summer Camp Private Pay Families 1 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	01. Weekly Summer Camp Regular (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

5. Locate the classroom and select Upload a Classroom Picture



Flexible Care, Full Day Regular (View Semester) - Daily - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

6. Select Choose File



Supported File Types: jpg, jpeg, gif, or png

7. Locate and select the correct picture
8. Click Open
9. Click Upload
10. Once a photo is added, there will be a View Current Picture button

11. View the picture and delete or close at the bottom

Setup > Room, Room/Program- Extra Program Registration Info

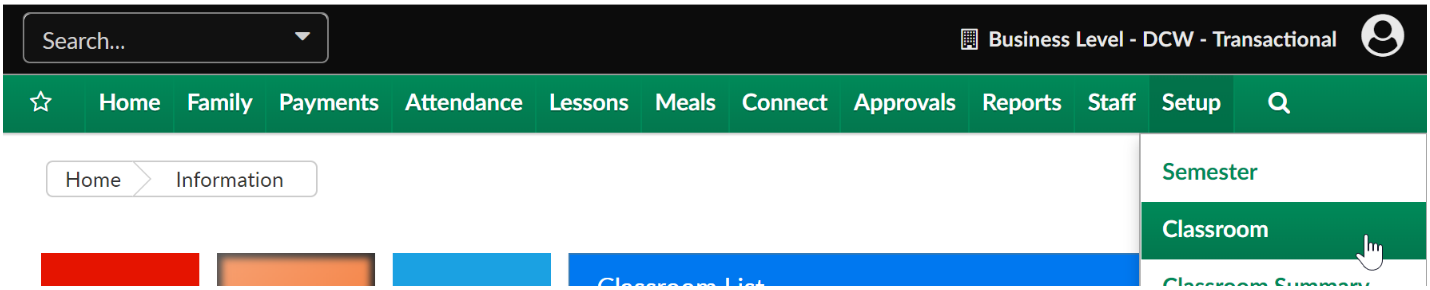
Last Modified on 03/20/2018 1:17 pm EDT

Extra Program Registration Info allows sites to insert customized questions by room/program. These questions could be specific to a program or general to site/center.

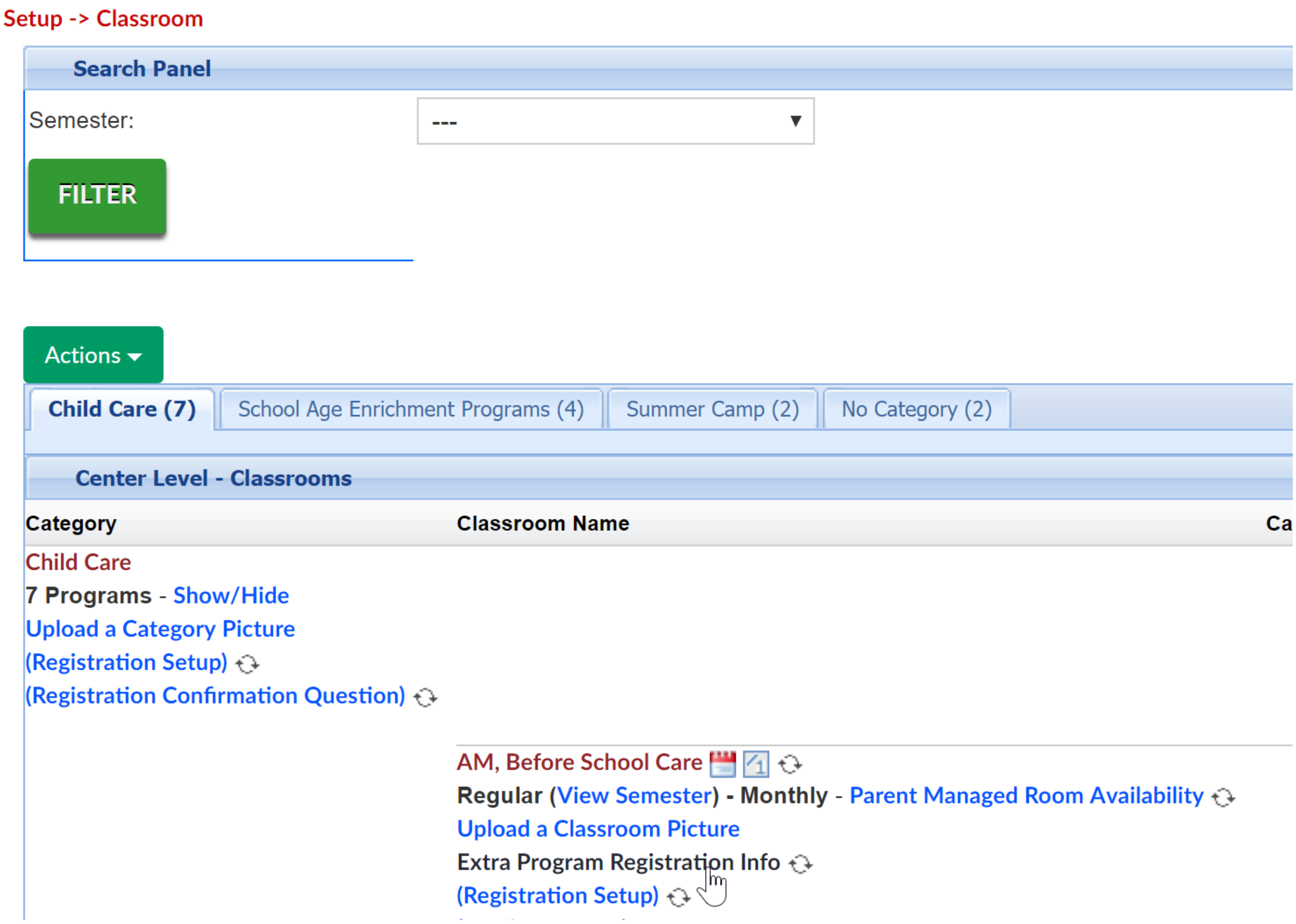
Registration questions at the classroom level allows centers to ask specific questions for parents through the Connect Portal during registration. These questions can be either a singular answer or a multiple choice.

Sample questions for this section could include "What size of t-shirt does the child wear?" These questions are text based questions.

Go to the Setup > Room page



Click on the Extra Program Registration Info link under one of the programs.

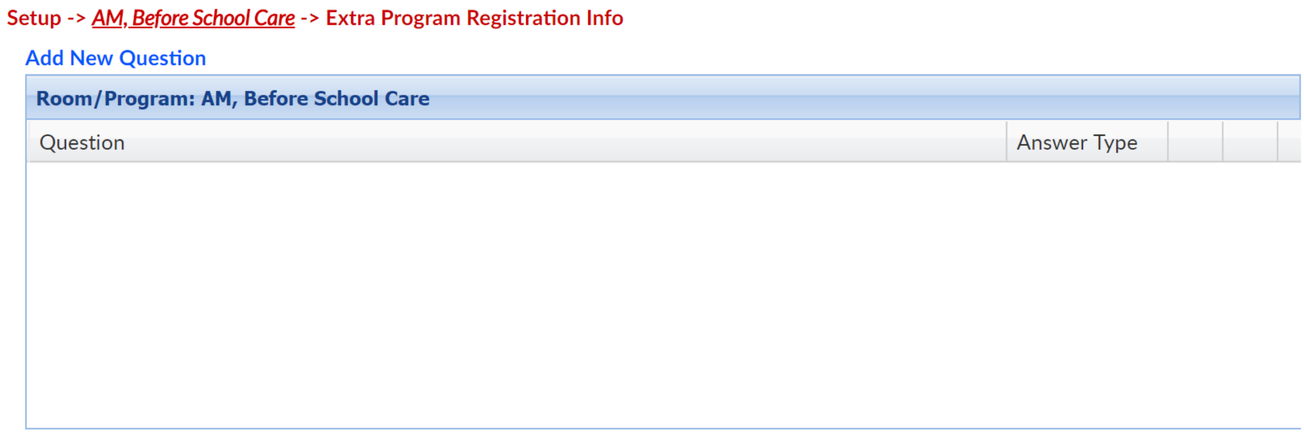


Semester: ---

Category	Classroom Name
Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)	
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup)

Enter the question that should display in the description box.

Choose if the question should be required, displayed or hidden in the display box.

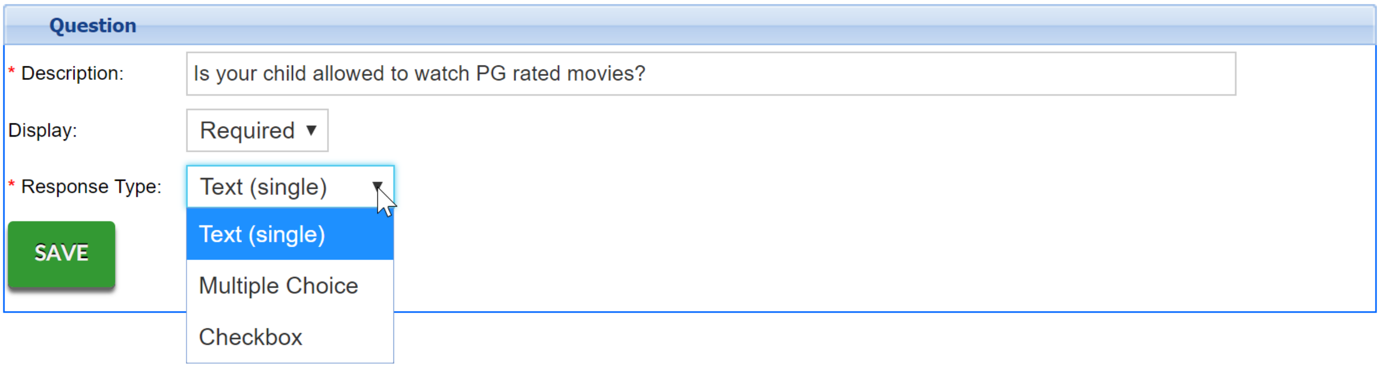


Setup -> *AM, Before School Care* -> Extra Program Registration Info

Add New Question

Room/Program: AM, Before School Care

Question	Answer Type		



Question

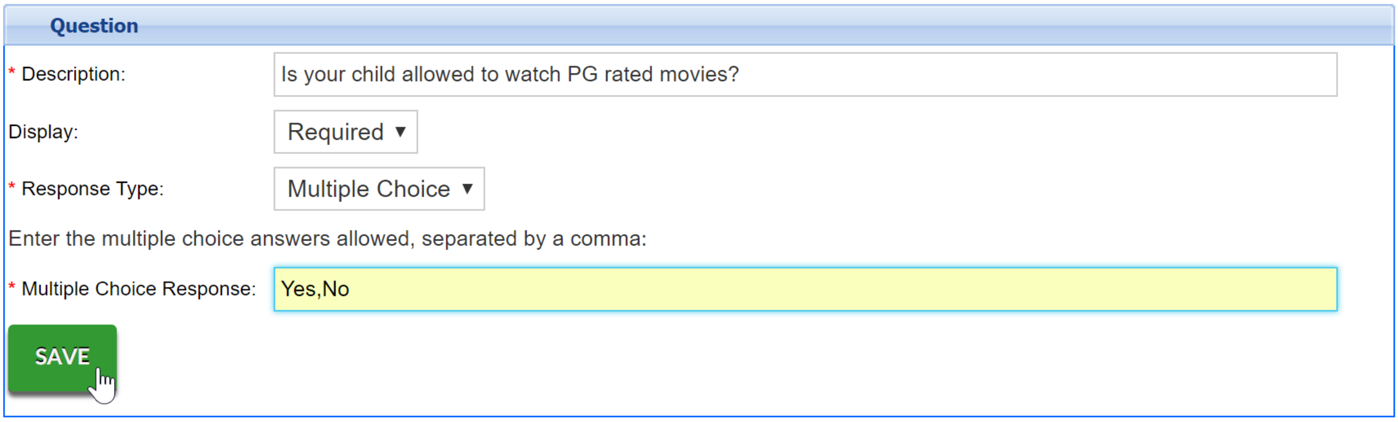
* Description: Is your child allowed to watch PG rated movies?

Display: Required

* Response Type: Text (single)

Then select the response type-

- Text- the parent will enter freeform text
- Multiple Choice- options will be entered and separated by commas i.e. yes,no would produce a dropdown list



Question

* Description: Is your child allowed to watch PG rated movies?

Display: Required

* Response Type: Multiple Choice

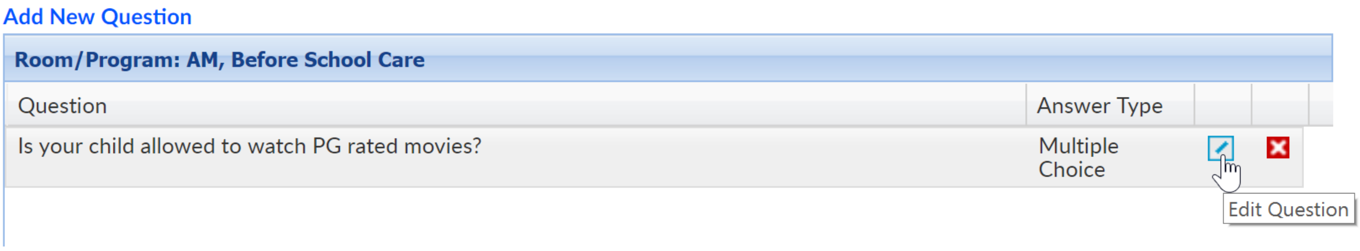
Enter the multiple choice answers allowed, separated by a comma:

* Multiple Choice Response: Yes,No

- Checkbox- the parent will need to check a box in agreement.

Enter detail, then press Save.

To edit a question, select the edit icon in line with the queston text-



Room/Program: AM, Before School Care

Question	Answer Type		
Is your child allowed to watch PG rated movies?	Multiple Choice		

Make edits as needed, then press Save.

Setup > Room, Room/Program- Extra Fee Setup

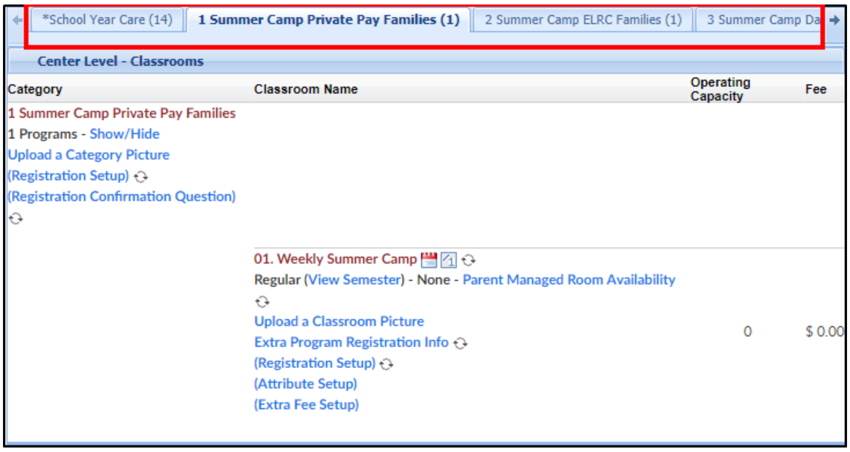
Last Modified on 12/03/2018 1:07 pm EST

The Extra Fee Setup allows administrators to add an additional fee to a room. Extra fees could be used to charge for any required materials for a specific room or t-shirt orders.

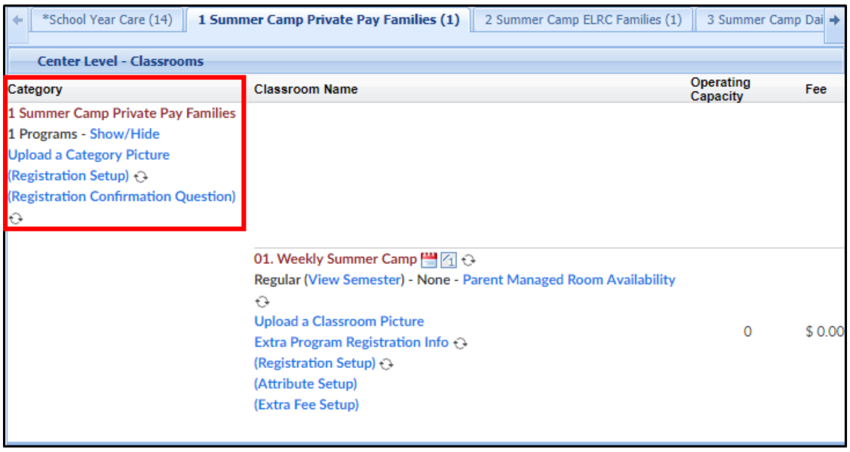
Please Note: In the family's financial ledger, the fee type will be "EFEE"

To Setup the Extra Fee:

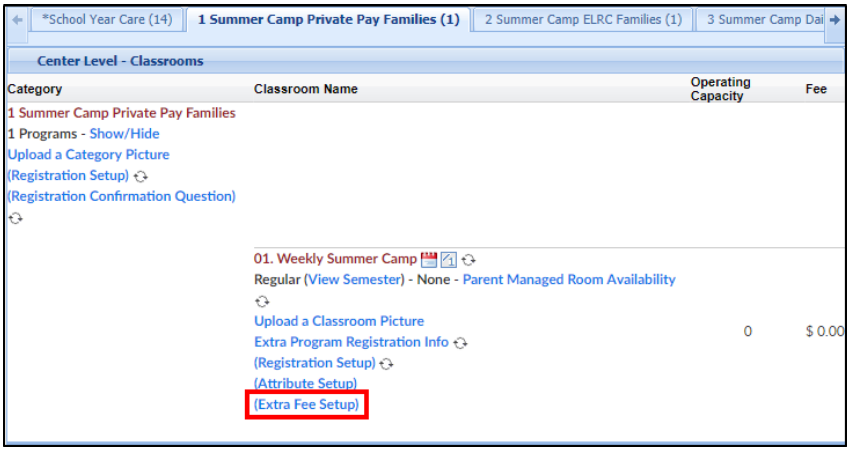
1. To navigate to the Extra Fee Setup screen, click Setup from the menu
2. Select Classroom
3. Select the correct Semester



4. Locate the correct Category



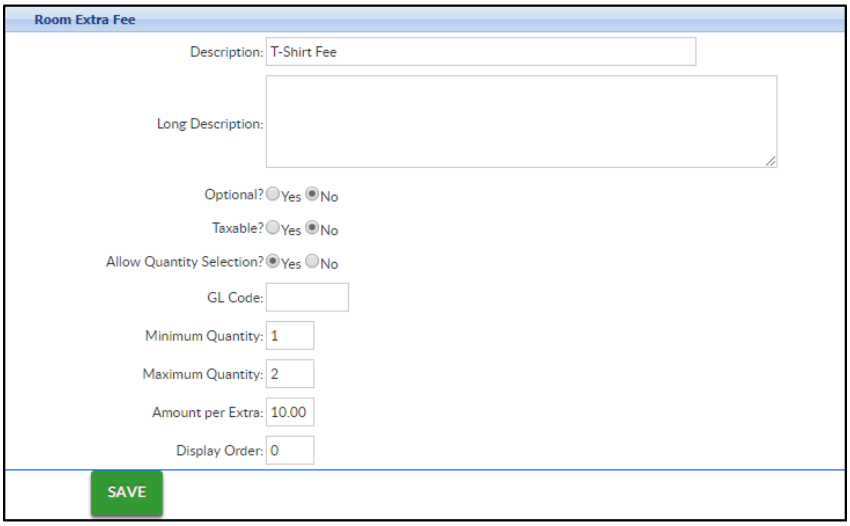
5. Locate the Classroom and click Extra Fee Setup



Center Level - Classrooms

Category	Classroom Name	Operating Capacity	Fee
1 Summer Camp Private Pay Families 1 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	01. Weekly Summer Camp Regular (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

6. Fill out the Room Extra Fee under the fees box



Room Extra Fee

Description: T-Shirt Fee

Long Description:

Optional? ○ Yes ● No

Taxable? ○ Yes ● No

Allow Quantity Selection? ● Yes ○ No

GL Code:

Minimum Quantity: 1

Maximum Quantity: 2

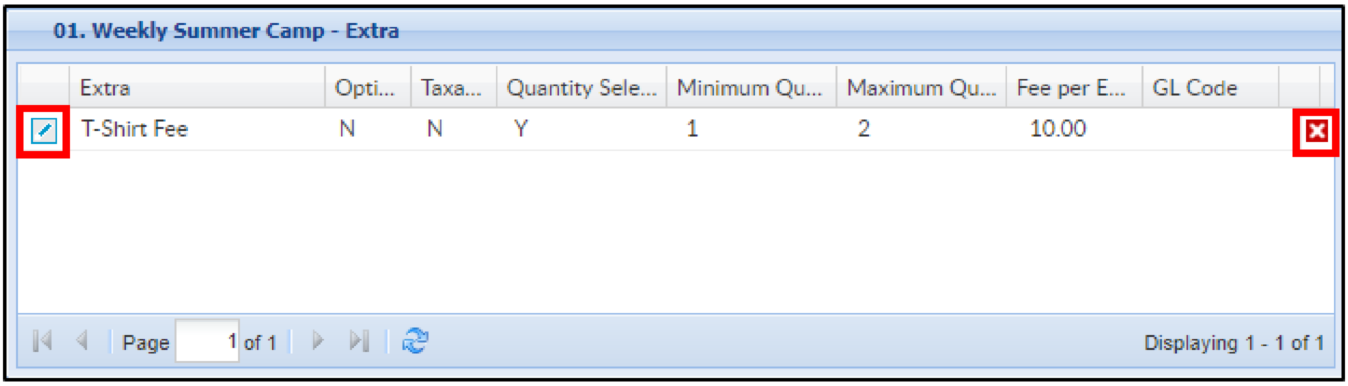
Amount per Extra: 10.00

Display Order: 0

- Description - enter the Description of the fee, this will only be displayed on the family's financial ledger
- Long Description - enter a detailed description, this will be displayed during registration
- Optional
  - Yes - the extra fee is not required for registration for the classroom
  - No - the extra fee is required for registration for the classroom
- Taxable
  - Yes - the extra fee is taxable. This section does require tax information to be setup first
  - No - the extra fee is not taxable
- Allow Quantity Selection
  - Yes - parents are able to purchase multiples of the item
  - No - multiples cannot be purchased
- GL Code

  - Minimum Quantity - enter the minimum amount of this item the parent can purchase
  - Maximum Quantity - enter the maximum amount of this item the parent can purchase
  - Amount per Extra - enter how much each of the extra fees will cost
  - Display Order - if there are multiple fees, enter the order the fee will be displayed for the classroom

7. Click Save
8. Once a fee has been added, it can be deleted or edited



01. Weekly Summer Camp - Extra

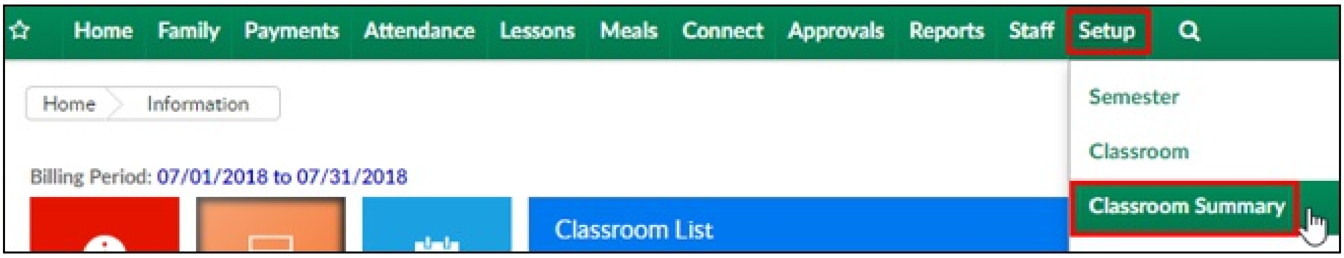
	Extra	Opti...	Taxa...	Quantity Sele...	Minimum Qu...	Maximum Qu...	Fee per E...	GL Code	
☑	T-Shirt Fee	N	N	Y	1	2	10.00		☒

Setup > Classroom Summary

Last Modified on 12/04/2018 12:37 pm EST

The Classroom Summary page allows a site to update select room information in bulk.

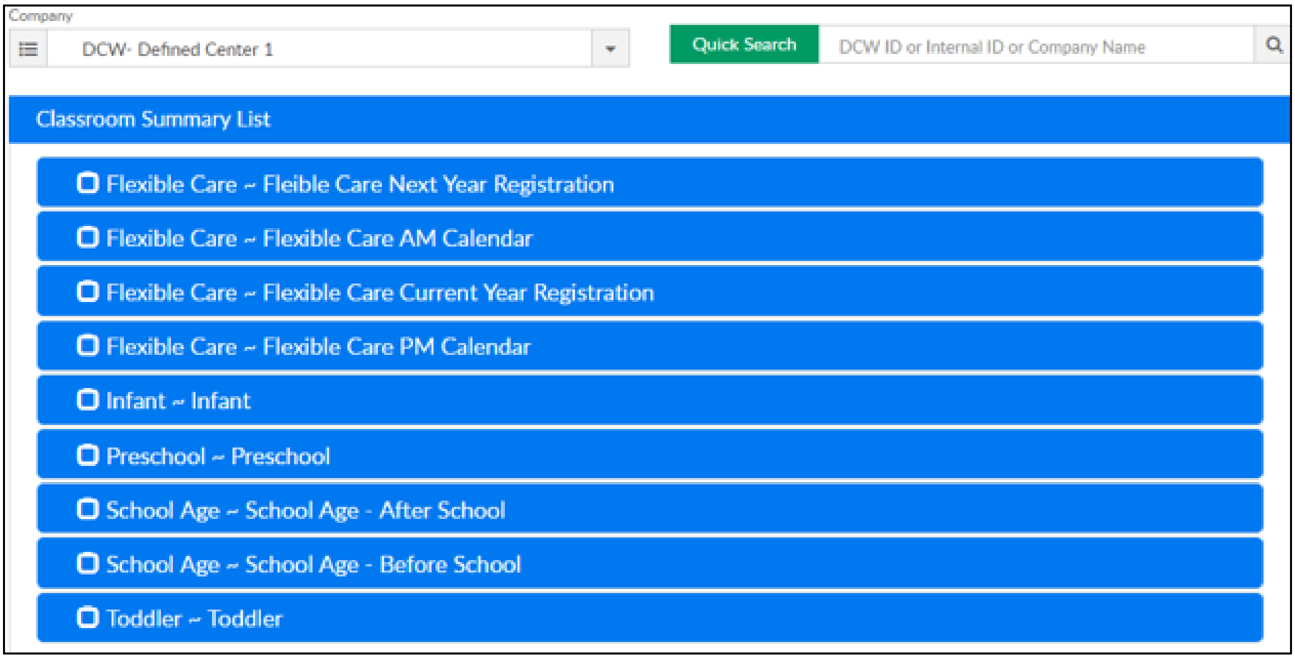
1. Click Setup and select Classroom summary



Billing Period: 07/01/2018 to 07/31/2018

2. Select a center from the Company drop-down list or use the Quick Search and type in the center name

3. Classroom Summary List will appear with a list of programs in alphabetical order by category



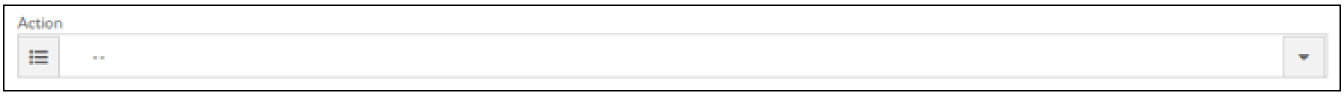
Company: DCW- Defined Center 1

- ☐ Flexible Care ~ Fleible Care Next Year Registration
- ☐ Flexible Care ~ Flexible Care AM Calendar
- ☐ Flexible Care ~ Flexible Care Current Year Registration
- ☐ Flexible Care ~ Flexible Care PM Calendar
- ☐ Infant ~ Infant
- ☐ Preschool ~ Preschool
- ☐ School Age ~ School Age - After School
- ☐ School Age ~ School Age - Before School
- ☐ Toddler ~ Toddler

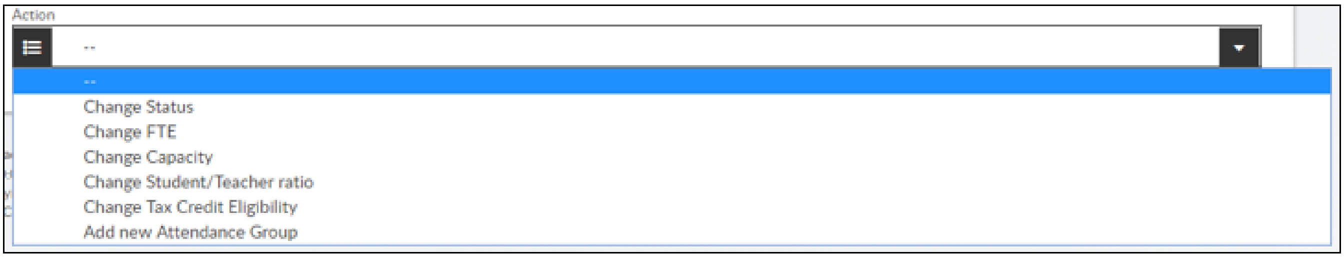
4. Place a check-mark on one or multiple to make a bulk change

☑ Flexible Care ~ Fleible Care Next Year Registration

5. Scroll down the page to the Action drop-down



6. Choose the correct option from the list



7. Make the correct change on the popup and click Save

Setup > Rates

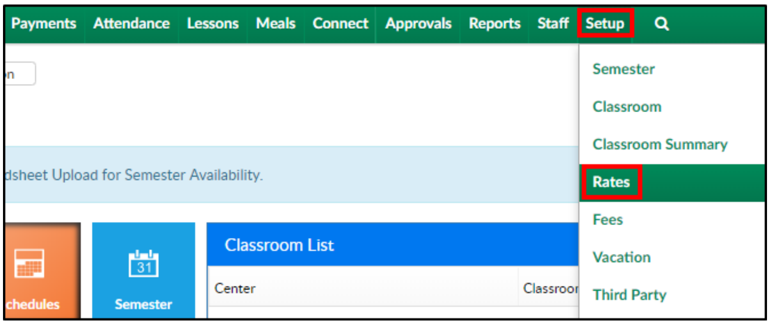
Last Modified on 12/03/2018 1:01 pm EST

In the system, there are many ways students can be charged for a room/program since multiple types of rates can be setup in the system.

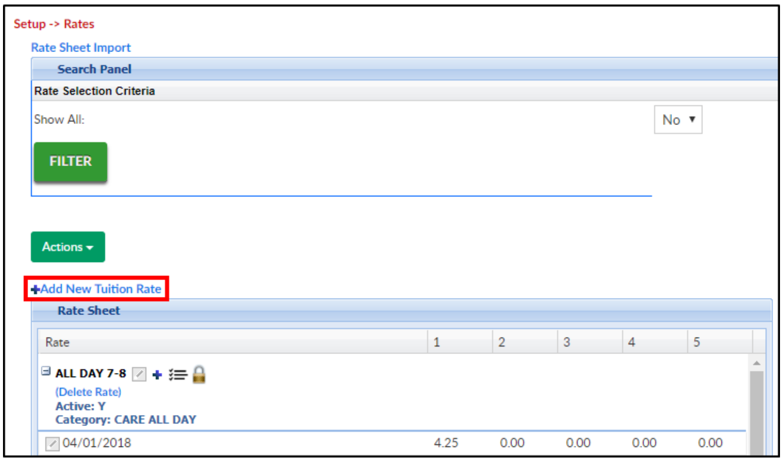
- **Normal Rate**: This rate bills students based on the number of days they are scheduled to attend for the week. If an up-charge process is setup, students will initially be billed the number of days scheduled, but if their actual attendance exceeds the number of days scheduled, they will be charged the higher rate based on the number of actual days attended. The system will not down charge a student if their actual attendance does not exceed their scheduled attendance.
- **Flat Rate**: Flat rates allow centers to charge a single rate for the number of days the student is scheduled to attend. Flat rates are determined by the billing period created by the administrator. This rate can be based on two weeks, a month, or any time period. Flat rates are based on scheduled days the student is attending. The system does not automatically increase a student's rate based on their scheduled flat rate. If a student is scheduled for three days, but attends four days, they will still only be charged for three days.
- **Daily Rate**: Daily rates allow administrators the ability to identify and charge based on what day of the week a student is attending. This is typically done if one particular day of the week has extended hours or is more expensive.
- **Daily - Flat**: Daily Flat rates allow administrators the ability to charge based on what days a student is scheduled in a billing period. Using this, administrators can charge $40 for all Mondays in a billing period.
- **Hourly Rate**: Hourly billing allows administrators to charge for the exact length of time a student attended. For hourly rates, a student must have accurate attendance with time in/out to bill.
- **Collapsible Billing Rate**: Collapsible billing allows administrators the ability to offer families a discounted rate if a student is enrolled in a Before Care and After Care Classroom. Using collapsible billing, administrators can charge families up to four rates, a Before Care, an After Care, a Combined Care, and a Max Rate.

To setup a new Rate, follow the steps below:

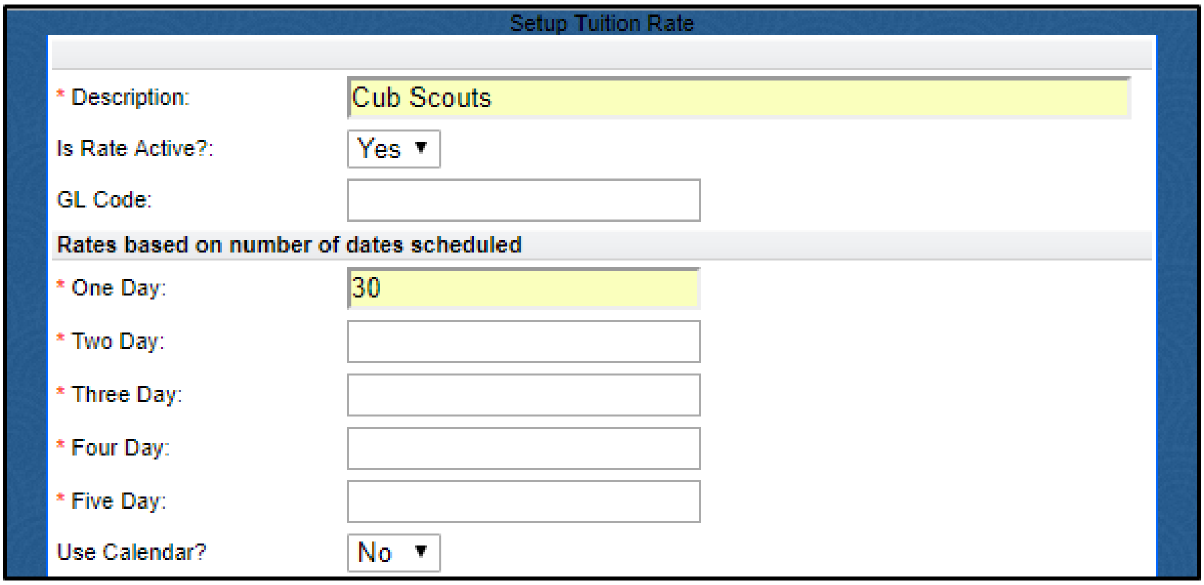
1. Click Setup from the menu bar, then select Rates



2. Click Add New Tuition Rate



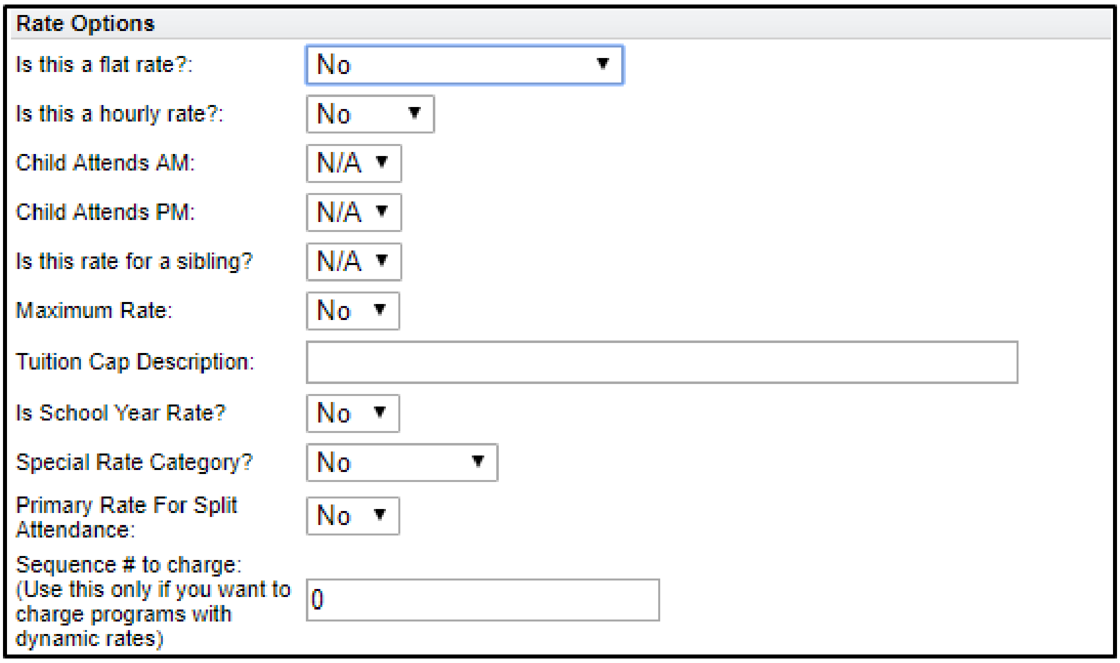
3. Complete the popup with the necessary information. Please Note: not all fields are required; required fields will have an asterisk (*)
4. Description - enter the name of the rate



* Description: Cub Scouts
Is Rate Active?: Yes
GL Code:
* One Day: 30
* Two Day:
* Three Day:
* Four Day:
* Five Day:
Use Calendar? No

5. Is Rate Active?
    - Yes - allow the rate to be selectable
    - No - rate is created, but not currently used
6. GL Code - enter the general ledger code for the rate, if applicable

7. One Day-Five Day - enter the rate for one day through five days. If the center bills a flat rate, enter the daily flat rate in each daily box. If the center bills on an hourly rate, enter the hourly rate in the One Day field and leave days 2-5 blank
8. Use Calendar?
    - Yes - the rate is going to be charged based on the center's calendar year
    - No - (Recommended Setting)
9. Is this a flat rate?



Rate Options

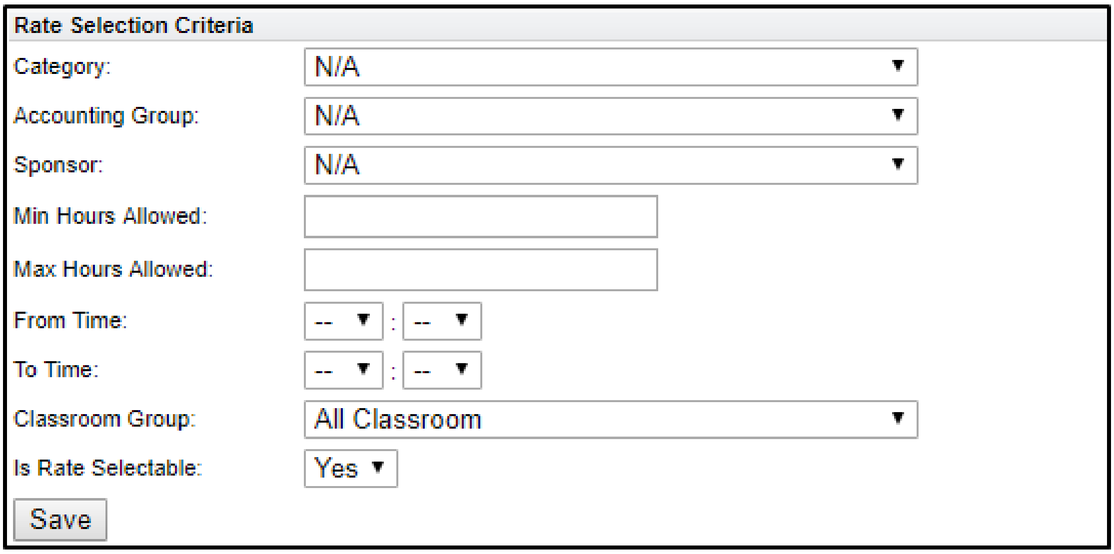
Is this a flat rate?:	No
Is this a hourly rate?:	No
Child Attends AM:	N/A
Child Attends PM:	N/A
Is this rate for a sibling?	N/A
Maximum Rate:	No
Tuition Cap Description:	
Is School Year Rate?	No
Special Rate Category?	No
Primary Rate For Split Attendance:	No
Sequence # to charge: (Use this only if you want to charge programs with dynamic rates)	0

    - Yes - the rate is a flat rate based on the billing period and this rate may prorate how much a student is billed depending on the student's start date
    - Yes - No Proration - the flat rate is based on the billing period and the rate will not prorate how much a student is billed
    - No - the rate is not a flat rate
    - Hourly - Attendance - the rate is billed based on hours recorded for a student's attendance
    - Hourly - Schedule - the rate is billed based on the student's schedule
    - Hourly - Minutes - the rate is billed based on the minutes recorded for a student's attendance. If Hourly - Minutes is selected, the amount billed is the amount entered in the One Day text box divided by 60 multiplied by the number of minutes the student is enrolled in the classroom
    - Daily - the rate is based on what day of the week a student is attending. This

    is typically done if one particular day of the week has extended hours or is more expensive. The rate for Monday should be entered in the One Day field, Tuesday in the Two Day field, etc.
    - Daily - Flat - the rate is based on what day of the week a student is attending for the entire billing period. This would allow you to charge $40 for Monday for the entire month
    - Daily - Agency Only - use this to setup a daily flat rate for a third party agency
    - Weekly - Agency Only - use this to setup a weekly flat rate for a third party agency
10. Is this a hourly rate?
    - Hourly - this is an hourly rate
    - No - this is not an hourly rate
11. Child Attends AM
    - N/A - not applicable
    - Yes - the student attends in the morning
    - No - the student does not attend in the morning
12. Child Attends PM
    - N/A - not applicable
    - Yes - the student attends in the afternoon/evening
    - No - the student does not attend in the afternoon/evening
13. Is this rate for a sibling?
    - N/A - not applicable
    - Yes - this rate is for a sibling
    - No - this rate is not for a sibling
14. Maximum Rate
    - Yes - there is a maximum rate for tuition. Use this option if a room/program has multiple rates based on the hours a student attends
    - No - there is not a maximum rate for tuition
15. Tuition Cap Description - enter a message to display on the family's financial ledger indicating the rate was the cap
16. Is School Year Rate?

- Yes - the rate is associated to a center year setup in the system
- No - the rate is not associated to a center year setup

17. Special Rate Category?
    - No - **Recommended Setting**
    - Yes - the rate will be associated to a third party as a special rate
18. Primary Rate For Split Attendance
    - Yes
    - No
19. Sequence # to charge (dynamic rate option) - enter the sequence number to assign the rate. **Please Note**: once a sequence # is entered and saved, it cannot be edited
20. Category - to assign the rate to a rate category, select the category from the drop-down. Rate Categories help determine the rate for specific criteria
21. Account Group
22. Sponsor - to assign the rate to a third party agency, select the agency from the drop-down


Rate Selection Criteria
Category: N/A
Accounting Group: N/A
Sponsor: N/A
Min Hours Allowed:
Max Hours Allowed:
From Time: -- : --
To Time: -- : --
Classroom Group: All Classroom
Is Rate Selectable: Yes

23. Min Hours Allowed - enter the minimum number of hours allowed for this rate, if applicable
24. Max Hours Allowed - enter the maximum number of hours allowed for this rate, if applicable
25. From Time/To Time - if there is a specific time-frame to receive this rate, enter it here
26. Classroom Group - to assign the rate to a specific classroom, select from the drop-down

27. Is Rate Selectable
    - Yes - the rate can be selected
    - No - the rate is active, but cannot be selected when choosing a rate to assign
28. Click Save

Setup Scholarships

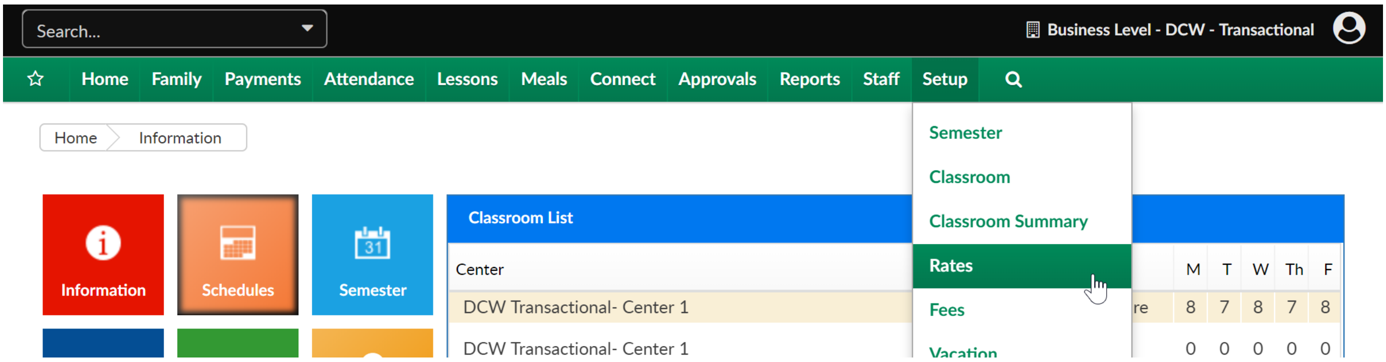
Last Modified on 03/14/2018 9:35 am EDT

Scholarships allow parents the ability to enter a coupon code during the registration process in the Connect Portal.

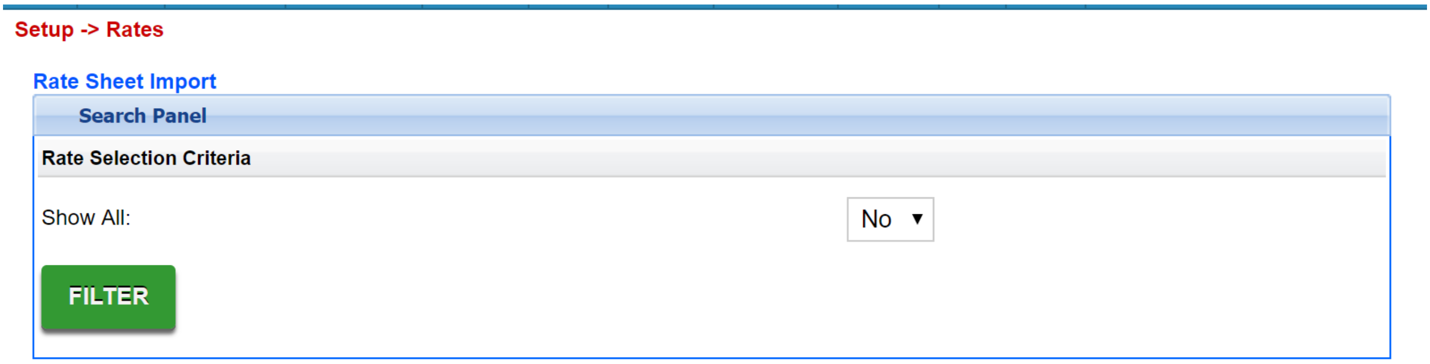
These scholarship codes are not displayed and must be provided to parents. Scholarships can have limits on the number of uses, but provides administrators an easy way to provide discounts to parents during registration.

Note: A payment type valid value named Scholarship must be added under setup > system config, valid values. **The name of the valid value should be named Scholarship with a short code of SCHL.**

From the Setup menu select the Rates option



On the Rates page, select the three white lines icon- then select Setup Scholarships-

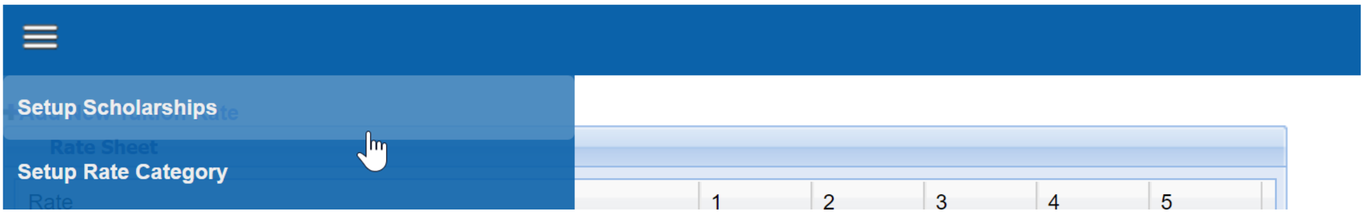

Setup -> Rates

Rate Sheet Import

Search Panel

Rate Selection Criteria

Show All: No

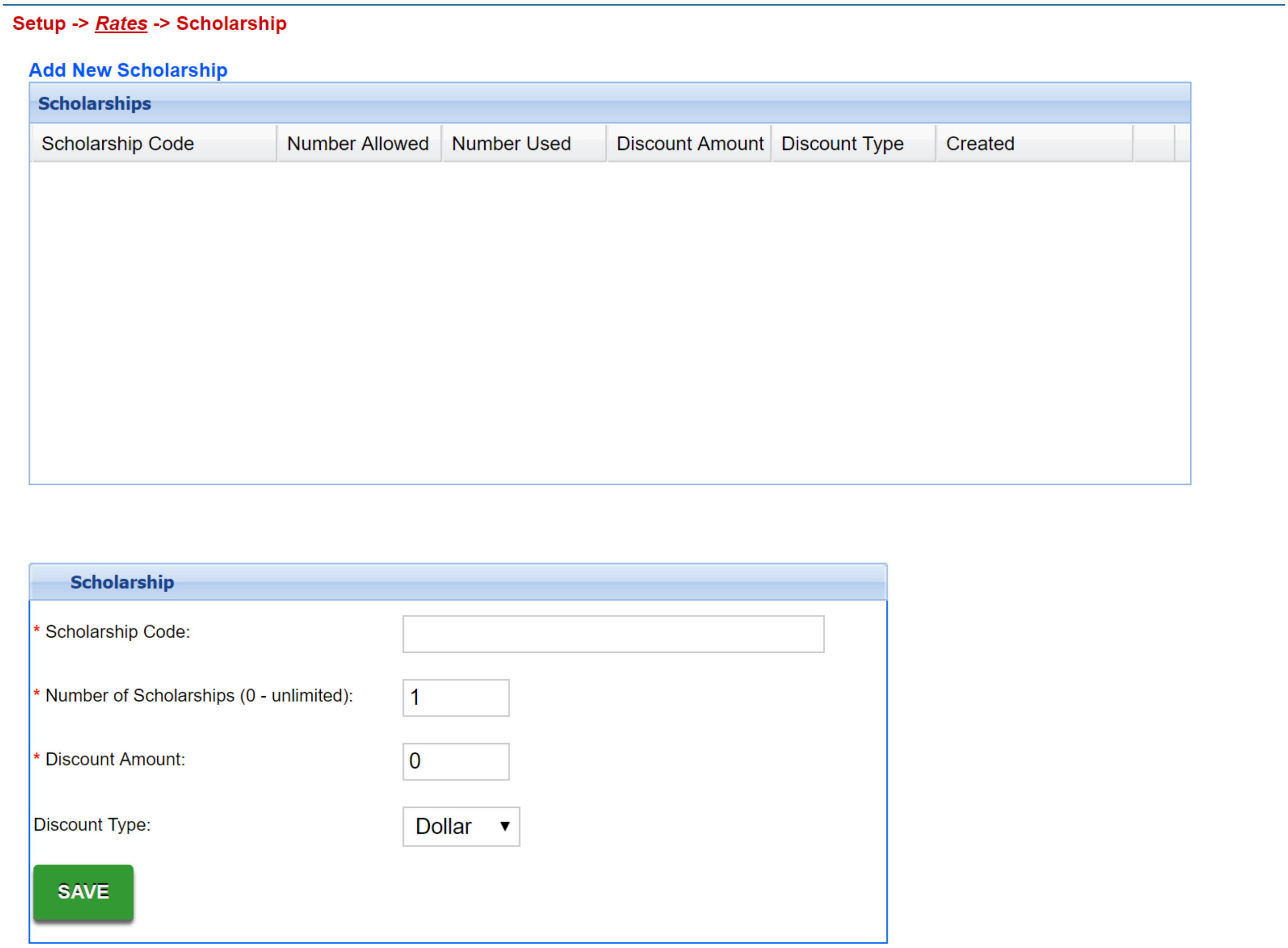


On the Setup Scholarships page any existing scholarships will display in the

Scholarships box.

To add a new scholarship select Add New Scholarship link. The fields will display as-

- Scholarship Code- this is the code the parent will enter on the cart page on registration checkout.
- Number of Scholarship (0-unlimited)- this is the limit for the number of scholarships (times the code can be used).
- Discount Amount- The amount of the scholarship
- Discount Type
  - Dollar
  - Percentage



Setup -> *Rates* -> Scholarship

Add New Scholarship

Scholarships

Scholarship Code	Number Allowed	Number Used	Discount Amount	Discount Type	Created

Scholarship

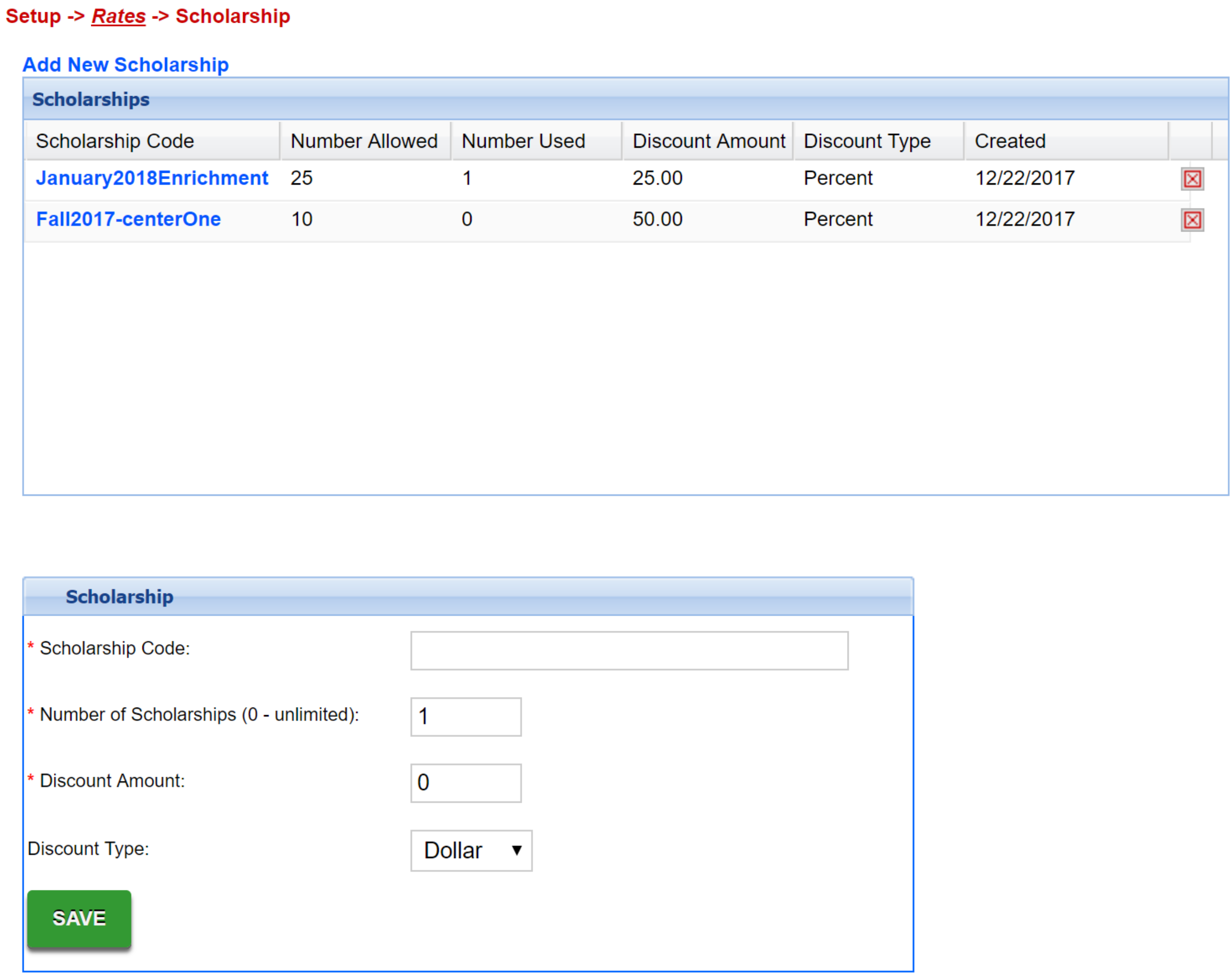
* Scholarship Code:

* Number of Scholarships (0 - unlimited): 1

* Discount Amount: 0

Discount Type: Dollar ▾

When a Scholarship has been added the code will display in the Scholarships box.



Setup -> *Rates* -> Scholarship

Add New Scholarship

Scholarships

Scholarship Code	Number Allowed	Number Used	Discount Amount	Discount Type	Created	
January2018Enrichment	25	1	25.00	Percent	12/22/2017	☒
Fall2017-centerOne	10	0	50.00	Percent	12/22/2017	☒

Scholarship

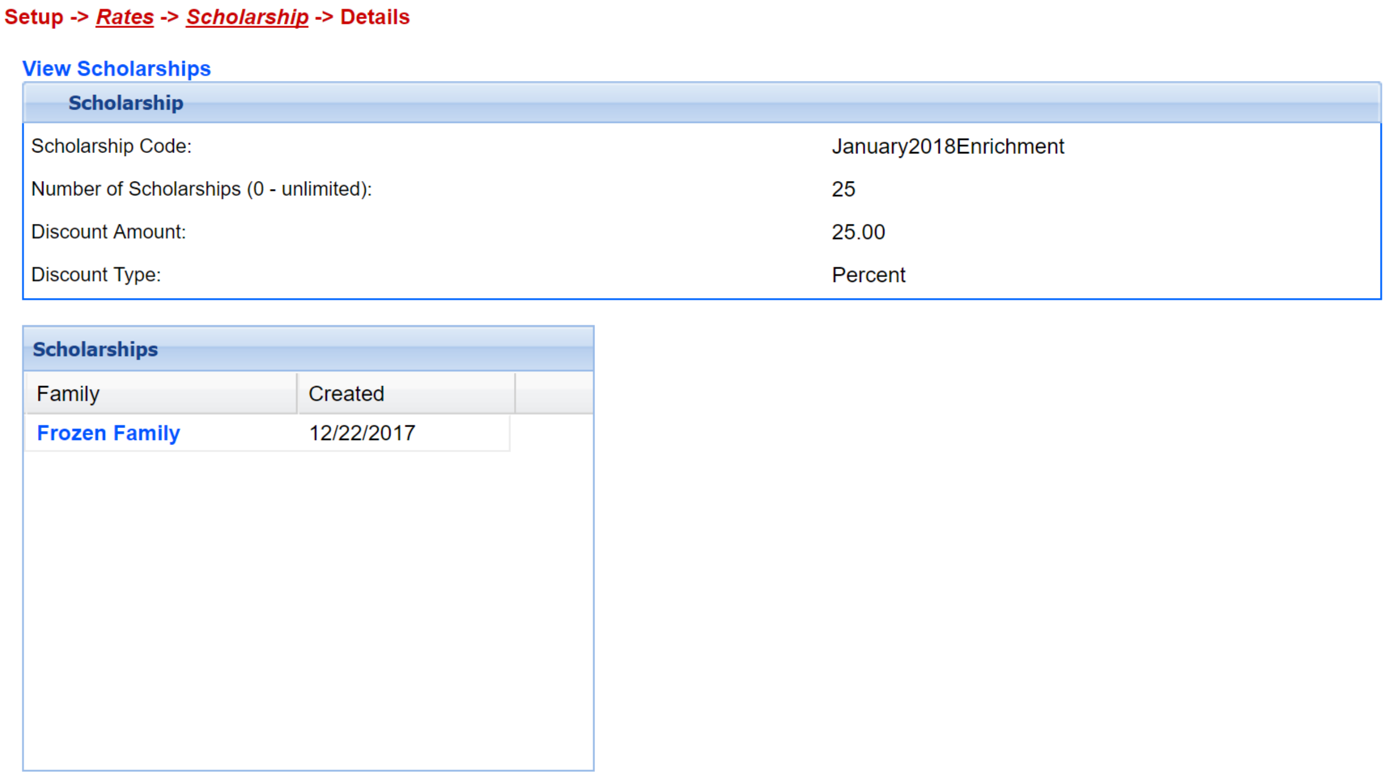
* Scholarship Code:

* Number of Scholarships (0 - unlimited): 1

* Discount Amount: 0

Discount Type: Dollar ▾

Click on the scholarship code to view the families that have used the code.



Setup -> *Rates* -> *Scholarship* -> Details

View Scholarships

Scholarship

Scholarship Code:	January2018Enrichment
Number of Scholarships (0 - unlimited):	25
Discount Amount:	25.00
Discount Type:	Percent

Scholarships

Family	Created
Frozen Family	12/22/2017

Setup Rate Category

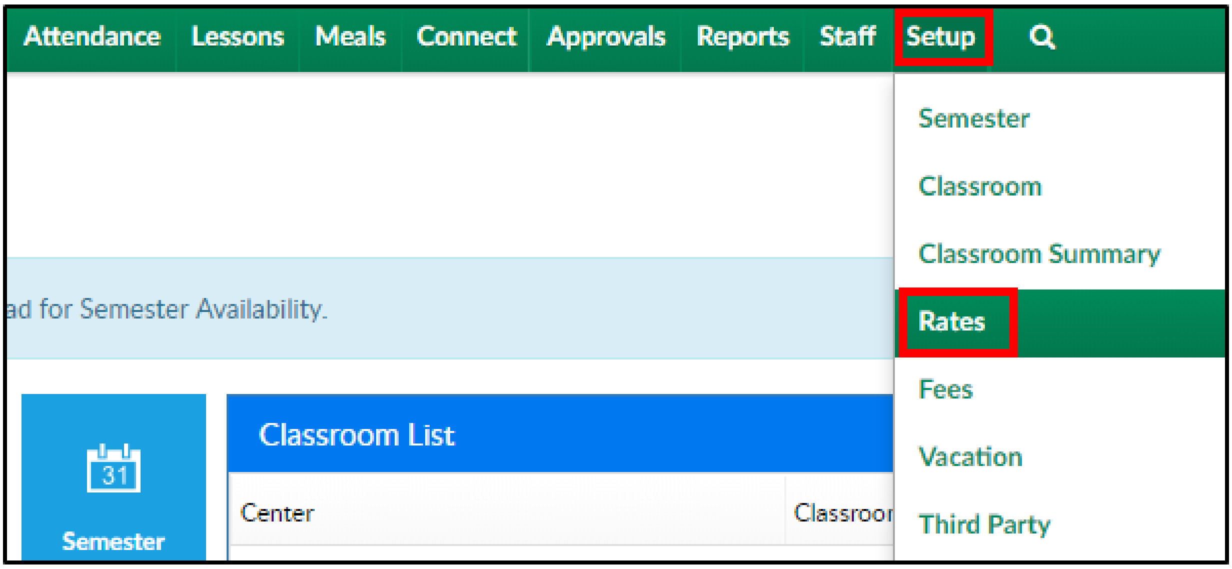
Last Modified on 12/18/2018 3:19 pm EST

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.

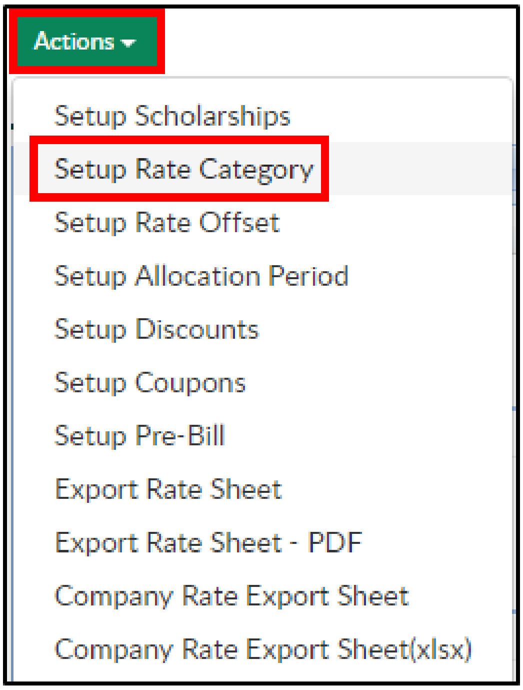
This method is optional; however we recommend setting up rate categories. Rate categories should be setup prior to setting up rates in the system.

---

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

Setup Rate Offset

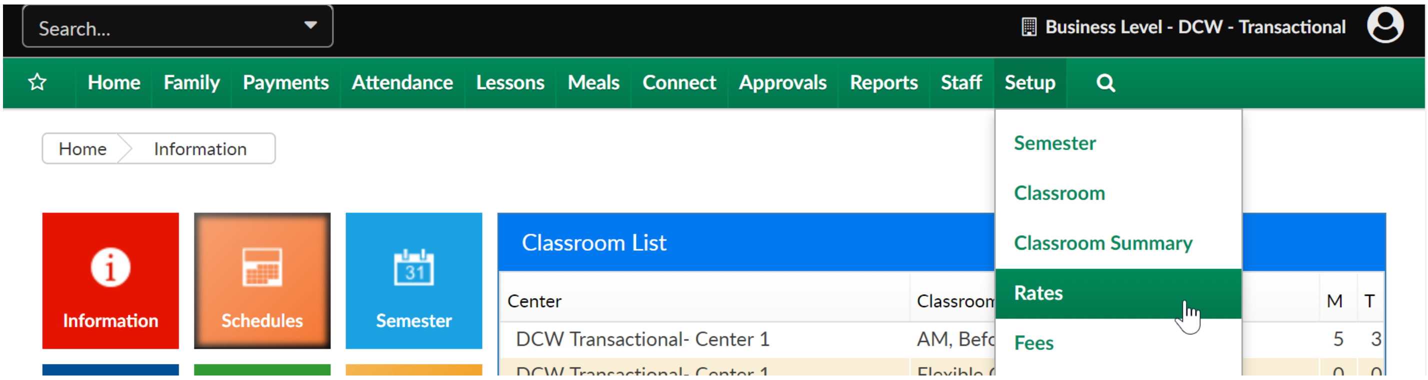
Last Modified on 05/21/2018 2:00 pm EDT

Rate offsets allow businesses the ability to increase or decrease rates for centers based off accreditation or other classifications associated to centers using the rate category.

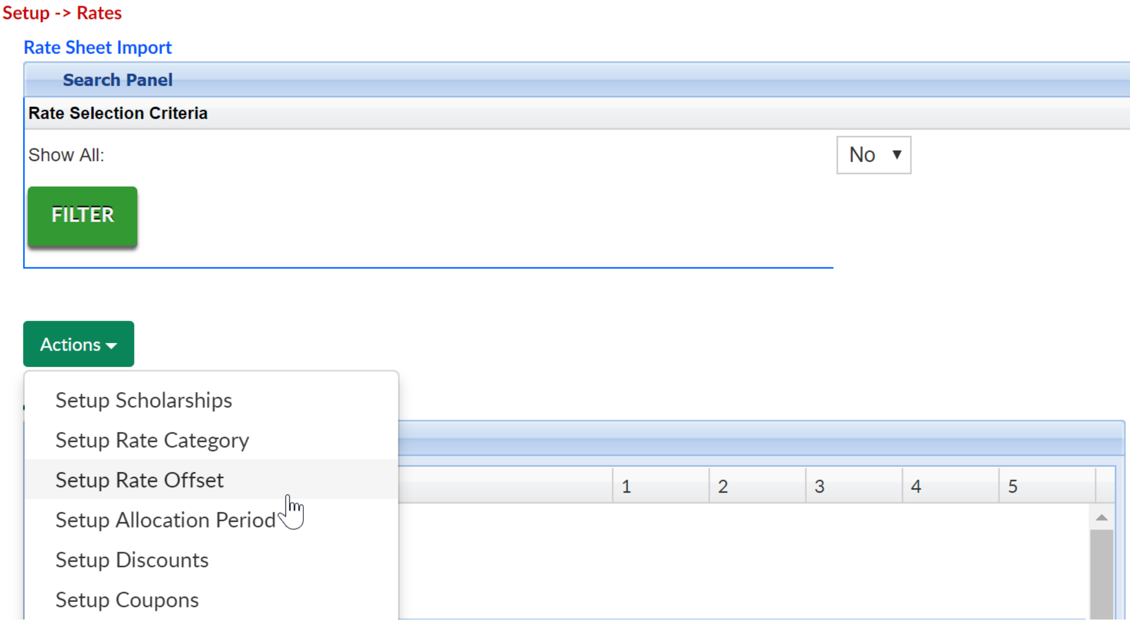
This allows a business to setup one default rate that would be used globally throughout every center and then have that rate increase or decrease based on the Center's assigned rate level.

Setting up rate offsets should be done at the business level.

From the setup menu, select the rates option-



Select the actions menu, then select Setup Rate Offset



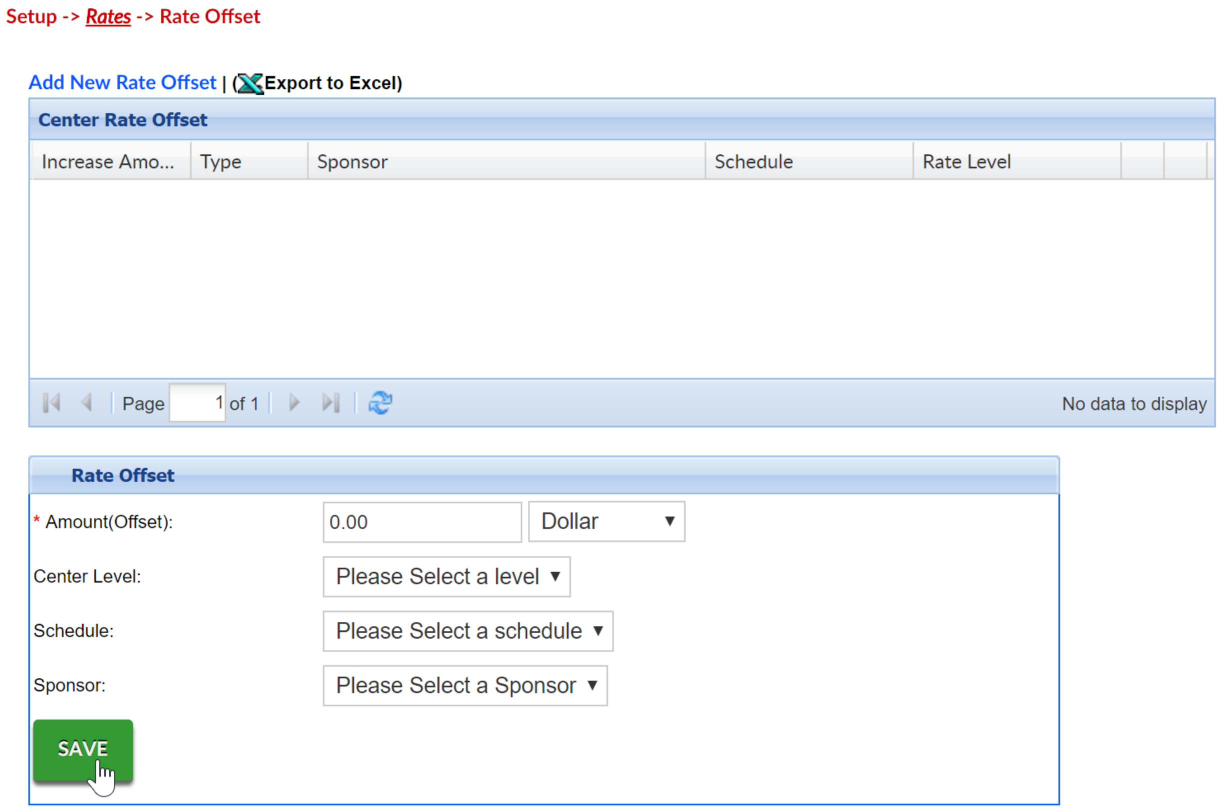
Enter the amount for the rate offset in the Amount(Offset) text box. Then select if the rate offset is a flat dollar or percentage in the Amount(Offset) drop down list.

Next, select the rate level associated to the rate offset in the Center Level drop down list.

If the rate offset is for a specific schedule for the child, select the schedule in the Schedule drop down list. Schedule is a Valid Value and will only be displayed if the Schedule Valid Value has been setup. *A Schedule Valid Value is assigned to a child in the Admission section for a child.*

If the rate offset is for a specific third party sponsor, select the third party sponsor or agency in the Sponsor drop down list. Sponsor is based off third party agencies setup in the Sponsors section. A child will only have the rate offset if the child is associated to the sponsor.

When finished, click on the Save button.



Setup Discounts

Last Modified on 12/04/2018 9:51 am EST

Discounts can be applied to families so the amount is automatically deducted when billing is created. Discounts can be in the format of a dollar amount or a percentage. Keep in mind the following points when creating a discount

- Only one discount can be applied to a student
- Discounts will not apply to registration fees, event programs, or parent managed calendar day selection

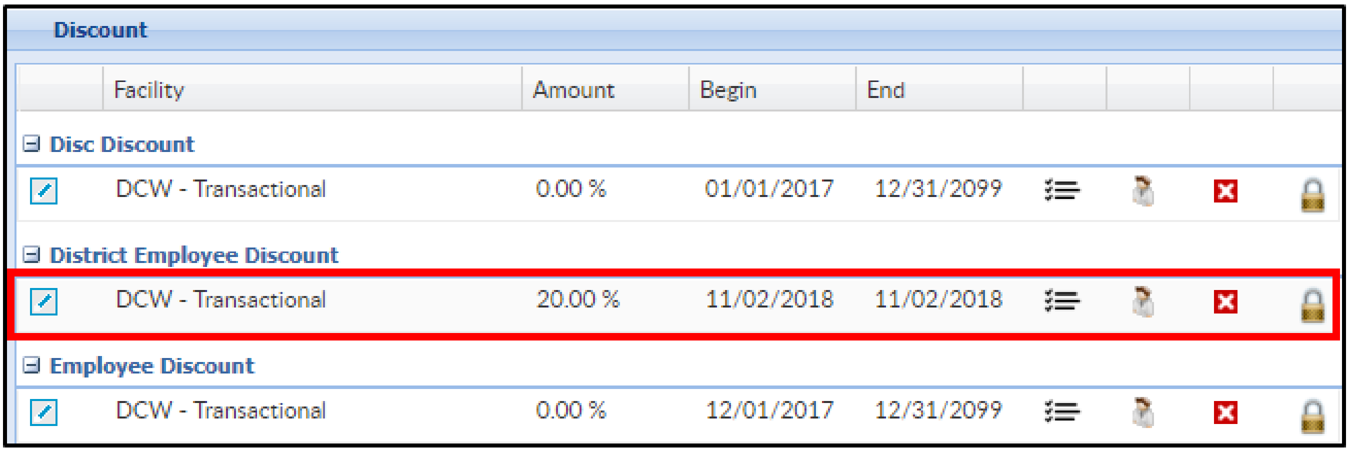
---

Creating a Discount

1. Click Setup from the menu bar and select Rates
2. Click Actions and choose Setup Discounts from the drop-down
3. Scroll to the Discount section and complete the fields
    - Name - enter the name of the discount
    - Discount Type
        - Normal - this type of discount will display in the discount drop down menu on the student's program/room assignment tab
        - Corporate - this type of discount will display on the parent screen, in order to apply this type of discount an employer ID must also be entered on the parent scree
        - Discretionary - this type of discount will display in relation to a specific program/room assignment
        - Third Party Overmarket Setup - this type of discount will be added on the setup > third party screen and will display if an overmarket value is incurred. (Overmarket is the difference between the market rate of tuition, parent copay and third party sponsor total)
    - Discount Amount - enter the amount of the discount, then select from the drop-down
        - Percent - this would give the student a percentage off the total
        - Fixed Amount - this would lock the student in at a specific amount

        - Dollar Off - this option would take dollars off the total amount
    - GL Code - enter the general ledger code for the discount, if applicable
    - Apply To Ages (In Months) - enter the ages, in months, of the students eligible for the discount
    - Apply To All
        - Programs
            - Yes - apply this discount to all classrooms within the center
            - No - do not apply to all classrooms within the center
        - Brands
            - Yes - apply this discount to all brands in the center
            - No - do not apply this discount to all brands in the center
    - Display as Family Discount
        - Yes - if this is a family discount. This must be selected to create the family discount
        - No - this is not a family discount
    - Apply To Revenue
        - Registrations
            - Yes - apply the discount to registrations for the student
            - No - do not apply the discount to registrations
        - Tuitions
            - Yes - apply the discount to tuition for the student
            - No - do not apply the discount to tuition for the student
    - Discount Limited
        - Employees
            - Yes - this discount is only available to employees in the center
            - No - the discount is not only for employees
        - Siblings
            - Yes - the discount is available only for siblings in families in the center
            - No - the discount is not only available for siblings
    - Employee Months of Service - if the discount is for employees, enter the required months of service

  - Reporting Group - if a reporting group is selected, the discount will be applied to every student within the family that is associated to the reporting group. The discount will not appear on the discount drop-down list on a student's Program/Room Assignment section
  - Parent Managed Count Days
    - Yes - the discount will be applied to a parent managed calendar. This option will only work for discounts setup as Fixed Amount
    - No - this discount will not be applied to a parent managed calendar
  - Starts - enter the start date of the discount
  - Ends - enter the end date of the discount
4. Complete the Corporate Discount Information section, if applicable. This information is for the discount sponsor
5. Click Save
6. The discount will now be added to the Discount section



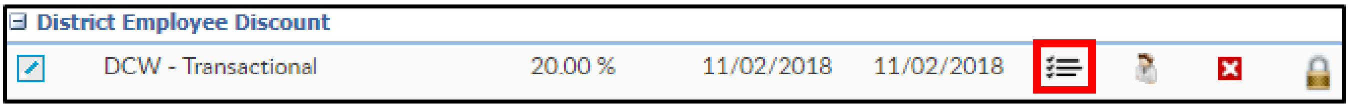
Discount

Facility	Amount	Begin	End
Disc Discount			
DCW - Transactional	0.00 %	01/01/2017	12/31/2099
District Employee Discount			
DCW - Transactional	20.00 %	11/02/2018	11/02/2018
Employee Discount			
DCW - Transactional	0.00 %	12/01/2017	12/31/2099

Adding Discount Categories

Discount categories allow administrators the ability to assign specific discounts for categories or classrooms.

1. If a Category must be added to the new Discount, click the View Discount Categories icon



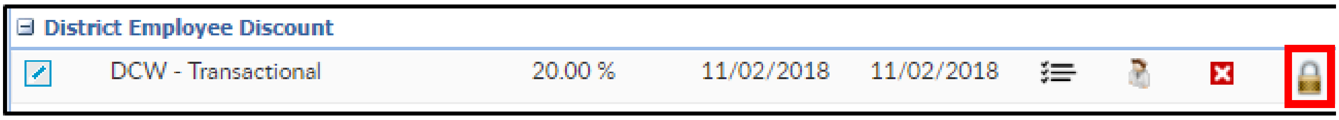
District Employee Discount			
DCW - Transactional	20.00 %	11/02/2018	11/02/2018

2. Fill out the Category section
  - Category - select a category the discount should apply to

    - Classroom - if the discount should only apply to a specific classroom, choose that here
    - Rate - if a specific rate should be discounted, select the rate here
    - Discount Amount - enter the discount amount, then select percent or fixed amount in the drop-down list
3. Click Save

View/Edit Authorizations

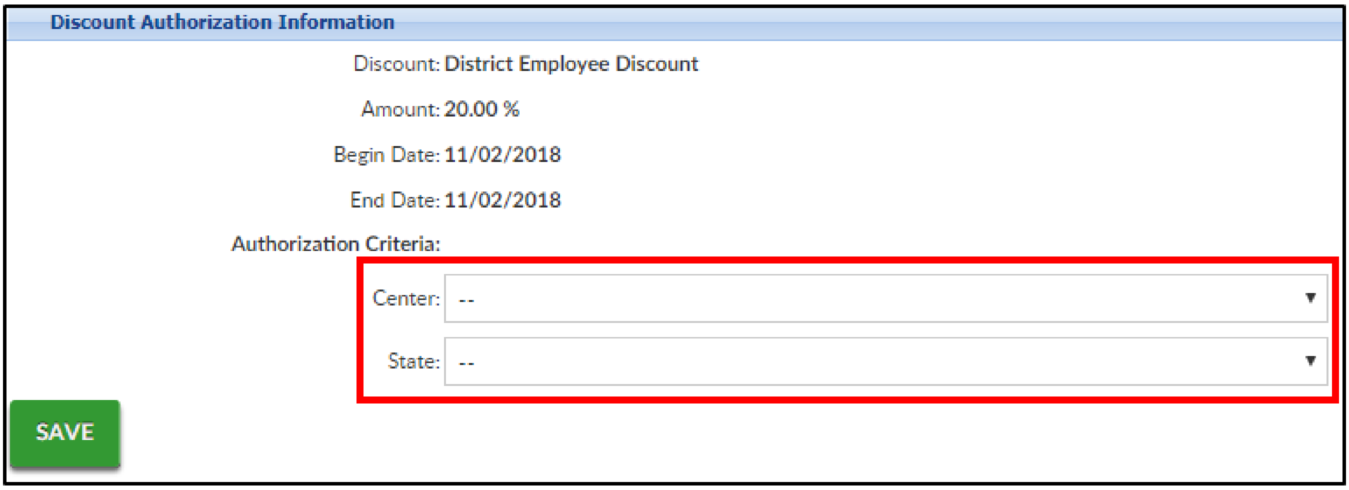
1. To authorize a discount for a specific center or state, click View/Edit Authorizations



District Employee Discount

DCW - Transactional 20.00 % 11/02/2018 11/02/2018

2. Select the Center and/or State from the drop-down list



Discount Authorization Information

Discount: District Employee Discount

Amount: 20.00 %

Begin Date: 11/02/2018

End Date: 11/02/2018

Authorization Criteria:

Center: --

State: --

3. Click Save

Setup > Coupons

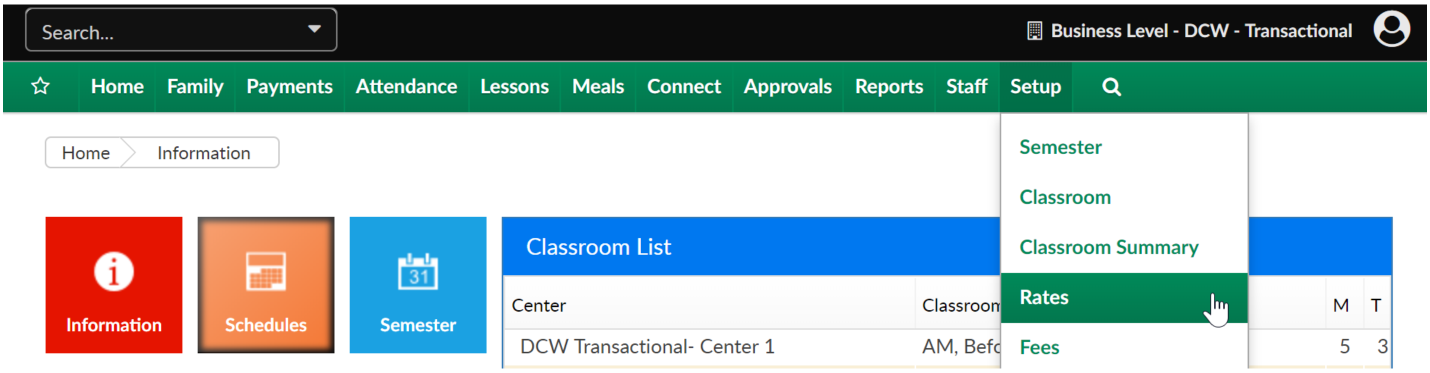
Last Modified on 05/21/2018 1:18 pm EDT

Coupons are discounts that apply to families in the Platform. Coupons can be applied to specific revenue types, such as tuition, registration or activity fees. Before setting up coupons, administrators should have already setup Revenue Type Valid Values, Type - Fee Valid Values and Rate Categories.

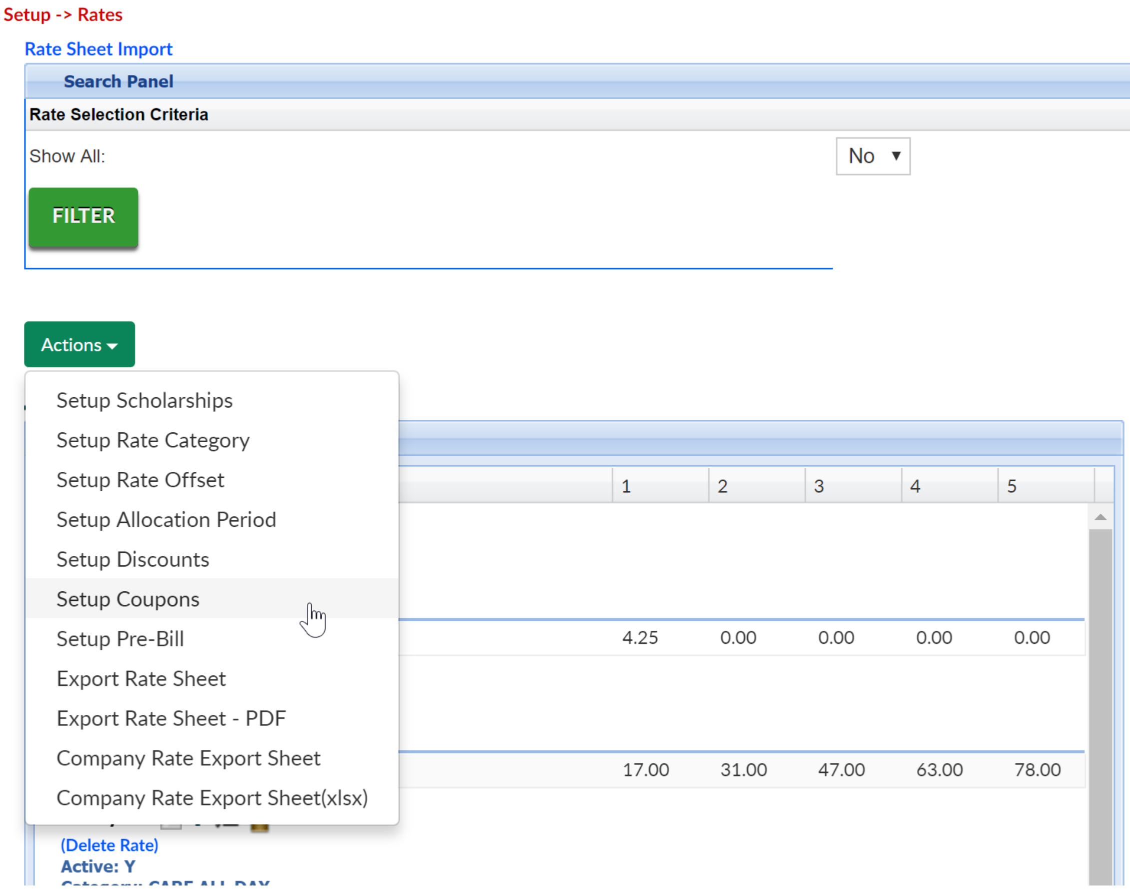
Coupons can be applied as a one-time coupon or for multiple billing periods. For coupons to apply to a family's financial ledger, there must be a Type - Fee Valid Value on the family's financial ledger that matches the Revenue Type drop down list setup for the coupon.

For Tuition coupons to be applied, the Tuition Revenue Type should be associated to the Rate Category.

From the main menu bar select Setup then select Rates.



Once on the rate page, scroll to the blue menu bar in the middle of the page, click on the icon to display the dropdown menu. Select Setup Coupons.

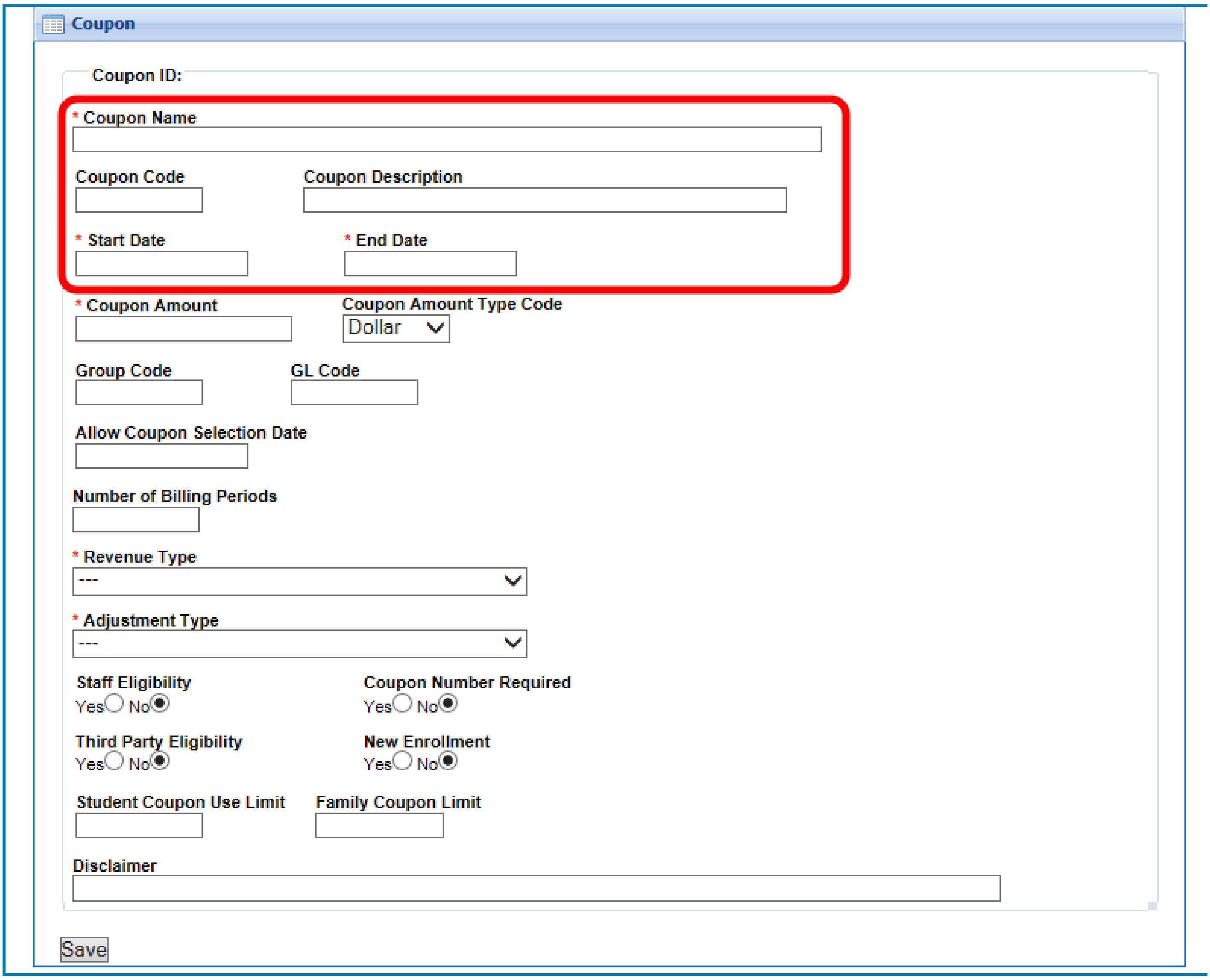


Enter the name for the coupon in the Coupon Name text box.

If there is an identification code for the coupon, enter the identification number or code for the coupon in the Coupon Code text box.

Enter a brief description for the coupon in the Coupon Description text box.

Add a start date and end date for the coupon in the Start Date and End Date text boxes. These dates determine when a coupon can be selected.



Coupon

Coupon ID:

* Coupon Name

Coupon Code

Coupon Description

* Start Date

* End Date

* Coupon Amount

Coupon Amount Type Code: Dollar

Group Code

GL Code

Allow Coupon Selection Date

Number of Billing Periods

* Revenue Type: ---

* Adjustment Type: ---

Staff Eligibility: Yes ○ No ●

Coupon Number Required: Yes ○ No ●

Third Party Eligibility: Yes ○ No ●

New Enrollment: Yes ○ No ●

Student Coupon Use Limit

Family Coupon Limit

Disclaimer

Save

Enter the total amount for the coupon in the Coupon Amount text box.

Select the type of value for the amount entered in the Coupon Amount text box in the Coupon Amount Type Code drop down list.

- Select Dollar to have the amount entered in the Coupon Amount text box assigned as a flat dollar discount.
- Select Percent to have a percentage entered in the Coupon Amount text box be discounted from the family's billing statement.

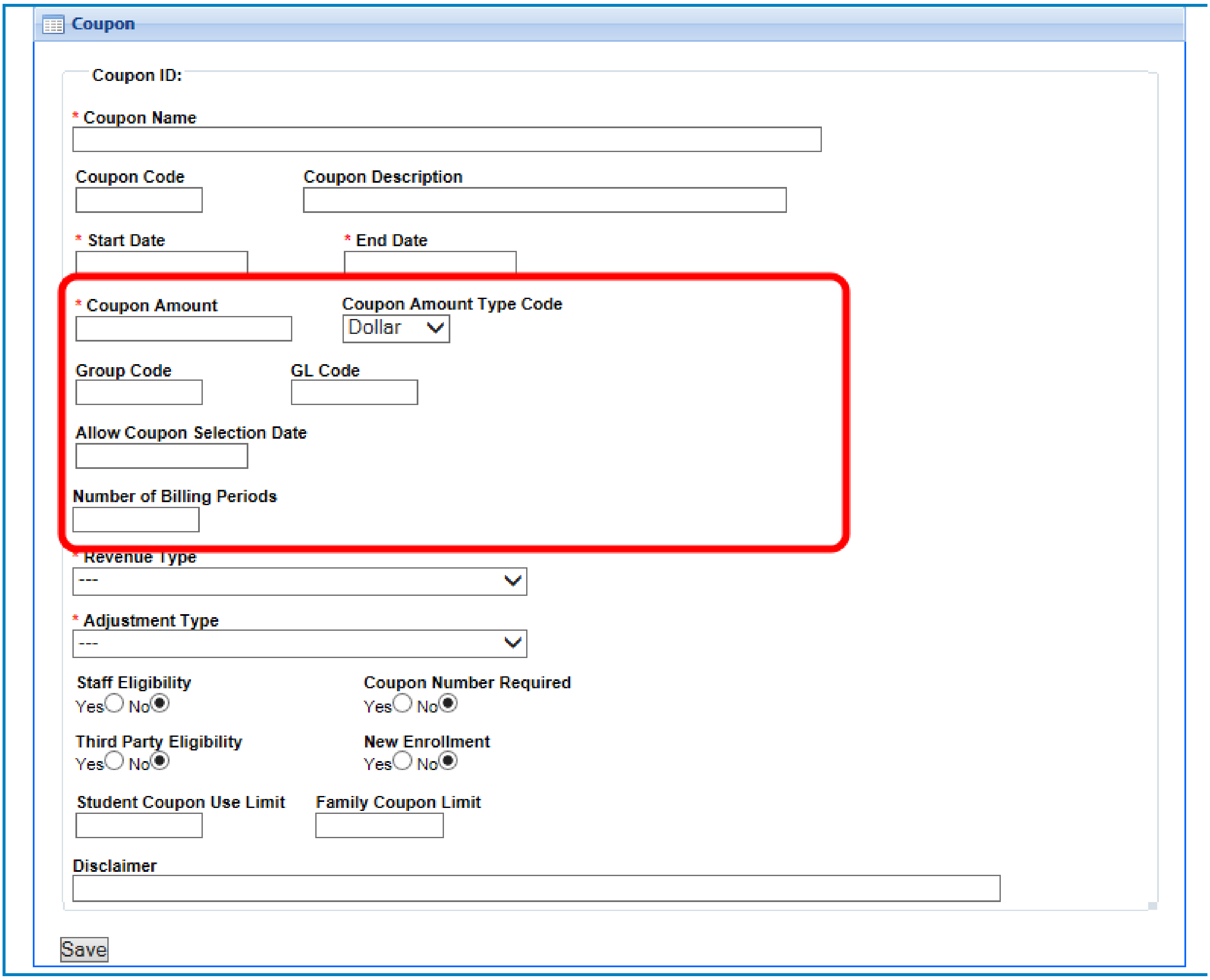
If necessary, enter the group code for the coupon in the Group Code text box.

If necessary, enter the general ledger code for the coupon in the GL Code text box.

Enter the number of billing periods the coupon will be effective in the Number of Billing Periods text box.

If a coupon will be applied for multiple weeks, the number of weeks must be entered in the Number of Billing Periods text box. If a coupon is for a one time discount, enter 1 in the Number of Billing Periods text box. If the coupon is for tuition in a classroom, a number must be entered in the Number of Billing Periods text box.

If a coupon is applied to a family's financial ledger with multiple billing periods, the coupon will continue to apply the discount until the coupon's billing periods are exhausted, even if the End Date for the coupon has passed.



Coupon

Coupon ID:

* Coupon Name

Coupon Code

Coupon Description

* Start Date

* End Date

* Coupon Amount

Coupon Amount Type Code: Dollar

Group Code

GL Code

Allow Coupon Selection Date

Number of Billing Periods

* Revenue Type: ---

* Adjustment Type: ---

Staff Eligibility: Yes ○ No ●

Coupon Number Required: Yes ○ No ●

Third Party Eligibility: Yes ○ No ●

New Enrollment: Yes ○ No ●

Student Coupon Use Limit

Family Coupon Limit

Disclaimer

Select the revenue type in the Revenue Type drop down list. This is the fee the coupon will be applied against.

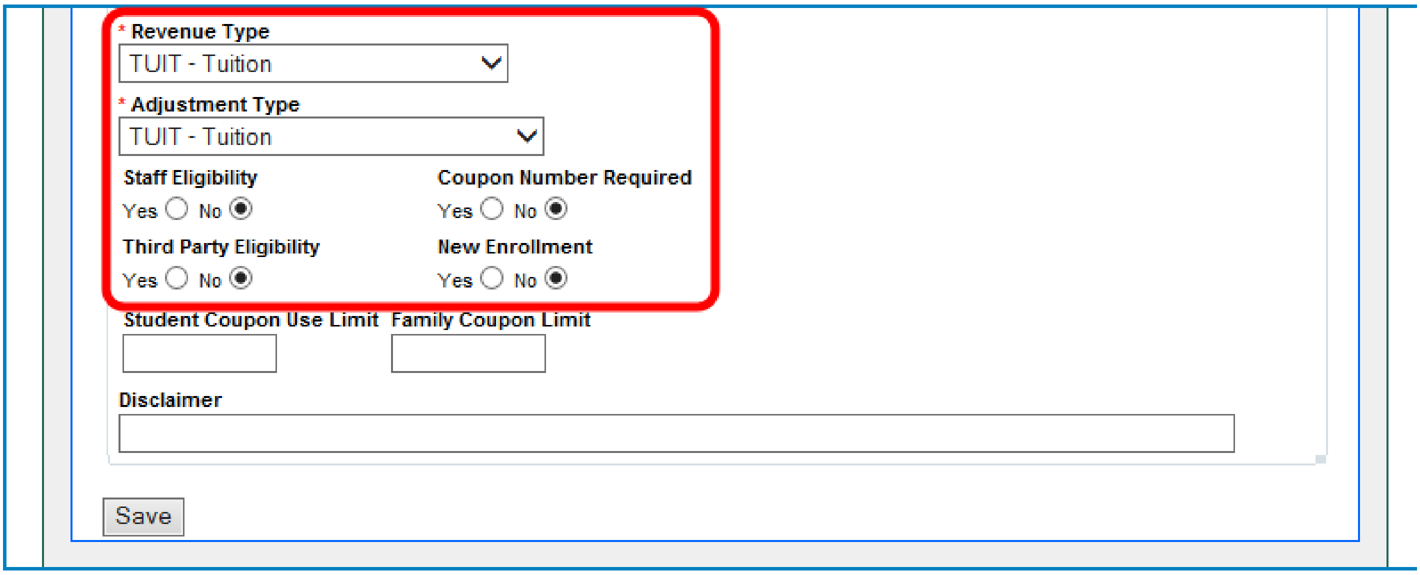
Select the Type - Fee Valid Value that will be displayed on the billing statement for the family in the Adjustment Type drop down list. This is the account that the coupon will be applied to.

If the coupon can be used by employees or staff members in the center, select Yes in the Staff Eligibility section.

If there is a coupon number that is required for families redeeming the coupon, select Yes in the Coupon Number Required section.

If the coupon can be used by families who are currently third party agency or sponsored families, select Yes in the Third Party Eligibility section.

If the coupon can be used by new enrollment families, select Yes in the New Enrollment section.



* **Revenue Type**
TUIT - Tuition

* **Adjustment Type**
TUIT - Tuition

Staff Eligibility
Yes ○ No ●

Coupon Number Required
Yes ○ No ●

Third Party Eligibility
Yes ○ No ●

New Enrollment
Yes ○ No ●

Student Coupon Use Limit

Family Coupon Limit

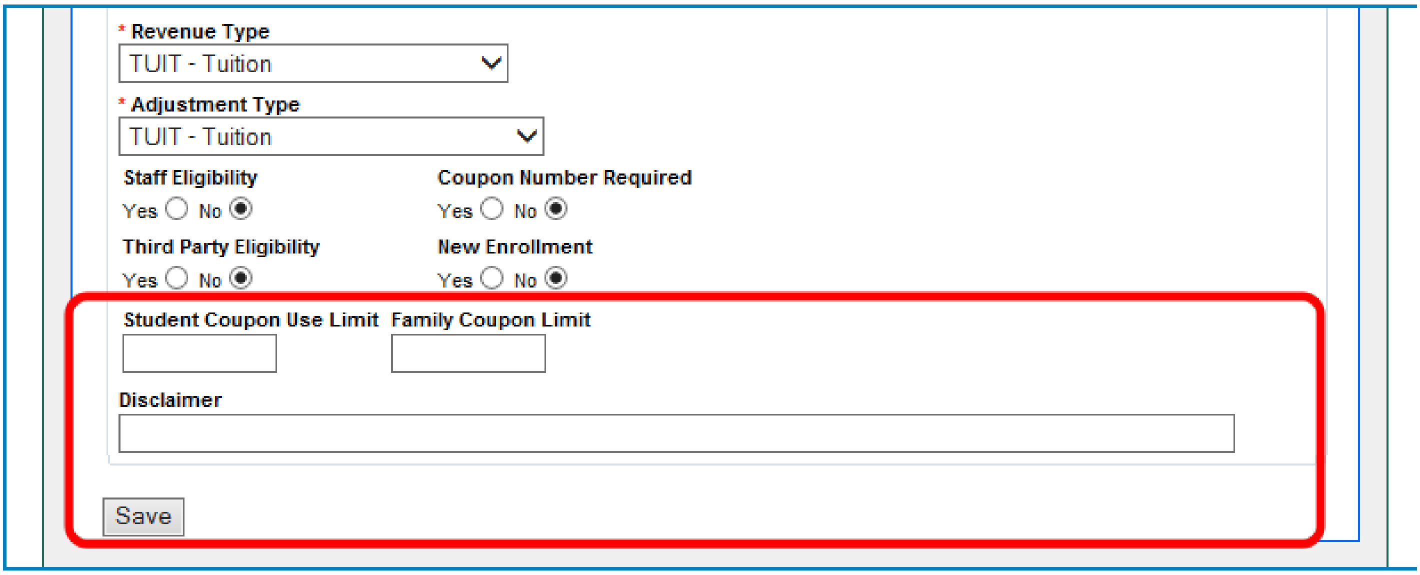
Disclaimer

Enter the number of times a student can use a coupon in the Student Coupon Use Limit text box.

Then, enter the number of times a family could use a coupon in the Family Coupon Limit text box.

If there are any disclaimers for the coupon that should be displayed, enter the disclaimers for the coupon in the Disclaimer text box.

When finished, click on the Save button. This will save the coupon for the center.



* **Revenue Type**
TUIT - Tuition

* **Adjustment Type**
TUIT - Tuition

Staff Eligibility
Yes ○ No ●

Coupon Number Required
Yes ○ No ●

Third Party Eligibility
Yes ○ No ●

New Enrollment
Yes ○ No ●

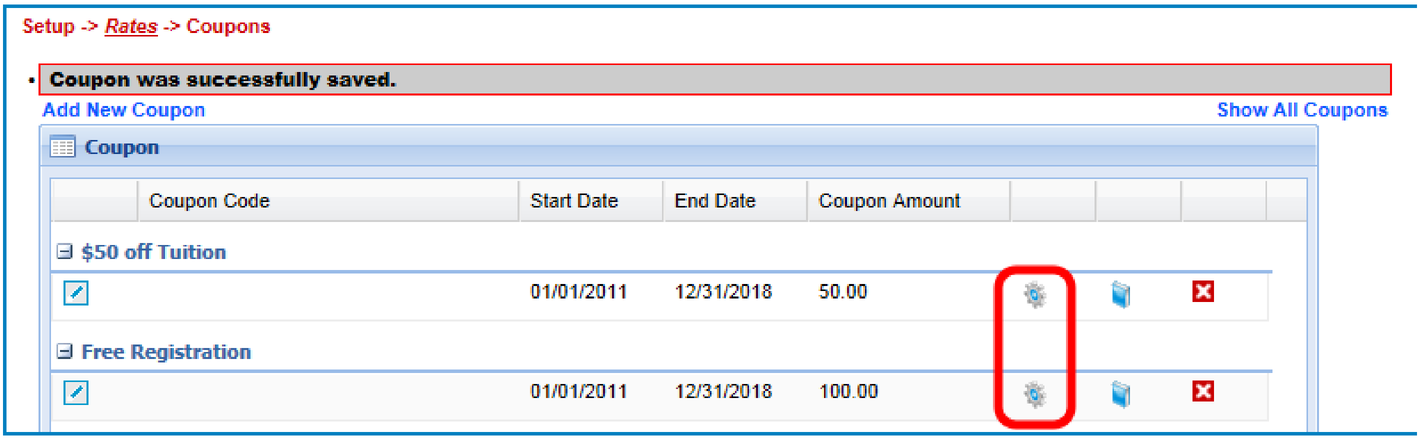
Student Coupon Use Limit

Family Coupon Limit

Disclaimer

After clicking on the Save button, the screen will refresh, indicating the save has been successful.

To assign an age range to a coupon, click on the Setup Coupon Range icon, located to the right of the coupon in the Coupon section.



Setup -> *Rates* -> Coupons

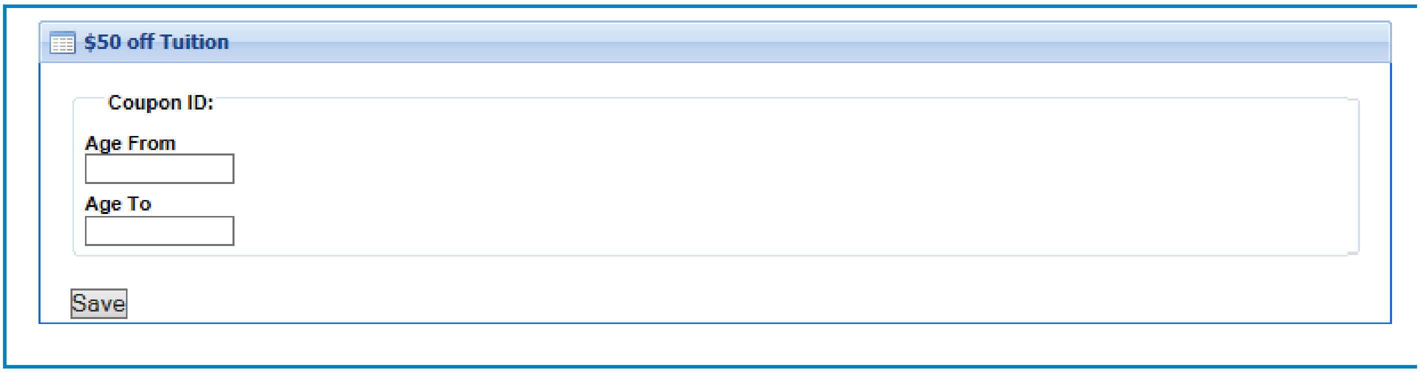
- **Coupon was successfully saved.**

	Coupon Code	Start Date	End Date	Coupon Amount			
$50 off Tuition							
		01/01/2011	12/31/2018	50.00			☒
Free Registration							
		01/01/2011	12/31/2018	100.00			☒

Enter the starting age for the coupon in the Age From field. The age entered in the Age From text box is in months.

Then, enter the ending age for the coupon in the Age To field. The age entered in the Age To text box is in months.

When finished, click on the Save button.

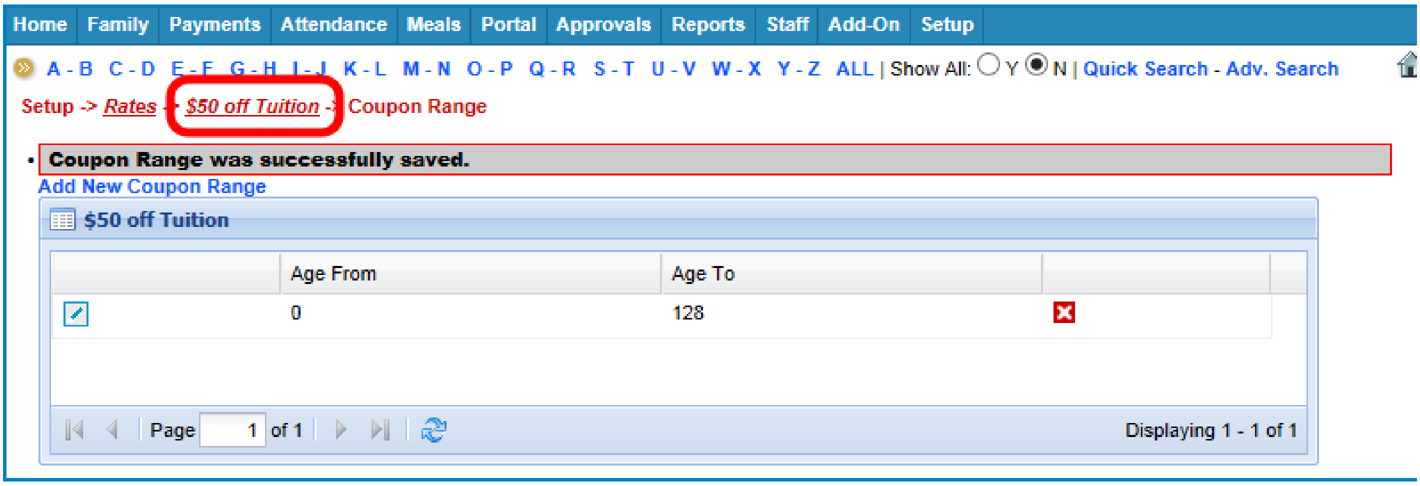


Coupon ID:

Age From

Age To

Click on the name of the coupon in the bread crumb section.

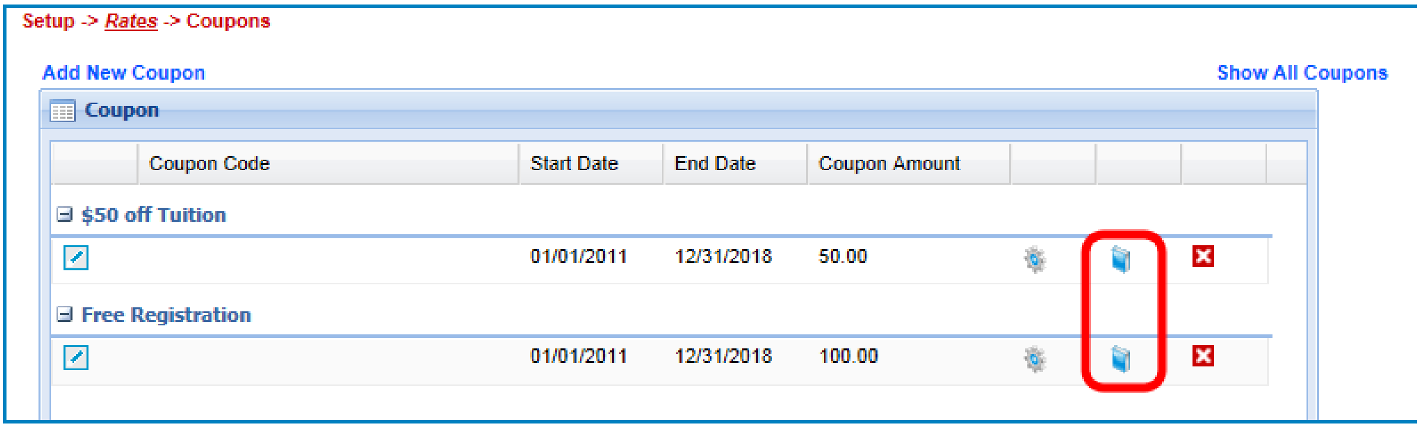


Setup -> Rates -> $50 off Tuition -> Coupon Range

- **Coupon Range was successfully saved.**

	Age From	Age To	
	0	128	

To authorize a coupon to a specific center, brand, division or district, click on the Setup Coupon Restriction icon, in the Coupon section.



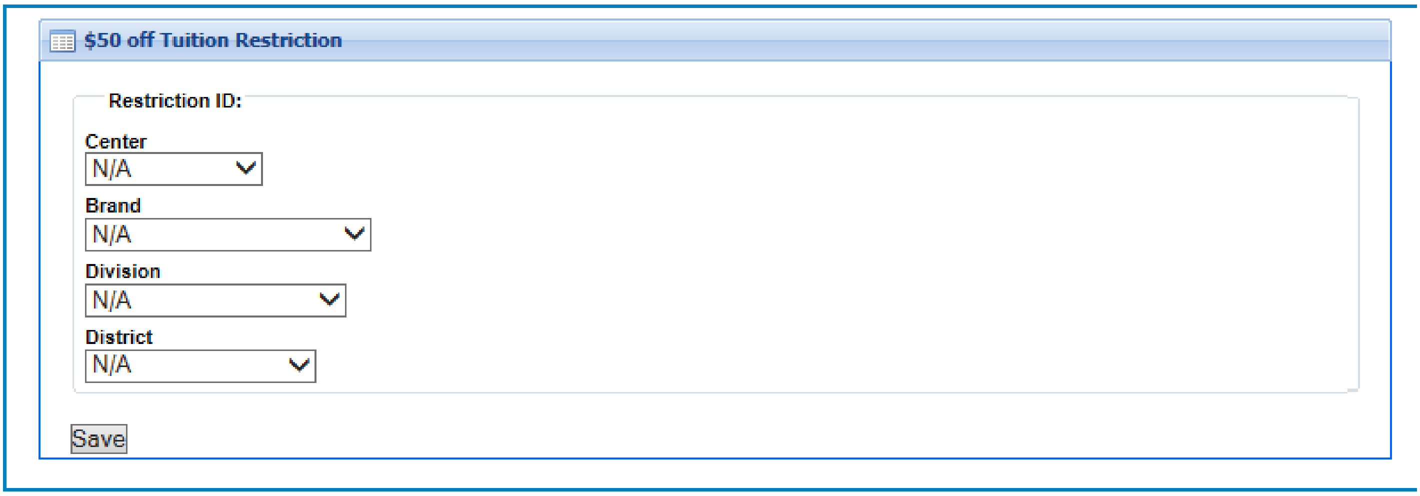
Setup -> Rates -> Coupons

	Coupon Code	Start Date	End Date	Coupon Amount			
$50 off Tuition							
		01/01/2011	12/31/2018	50.00			
Free Registration							
		01/01/2011	12/31/2018	100.00			

Select the center, brand, division or district that will be allowed to use the coupon in the Center, Brand, Division or District drop down lists.

If a center, brand, division or district is selected, the coupon will be allowed to be used at a center with any of the matching criteria. The coupon is not required to match all of the restrictive requirements to be used at a particular center.

When finished, click on the Save button. The screen will refresh, indicating the save has been successful.



$50 off Tuition Restriction

Restriction ID:

Center: N/A

Brand: N/A

Division: N/A

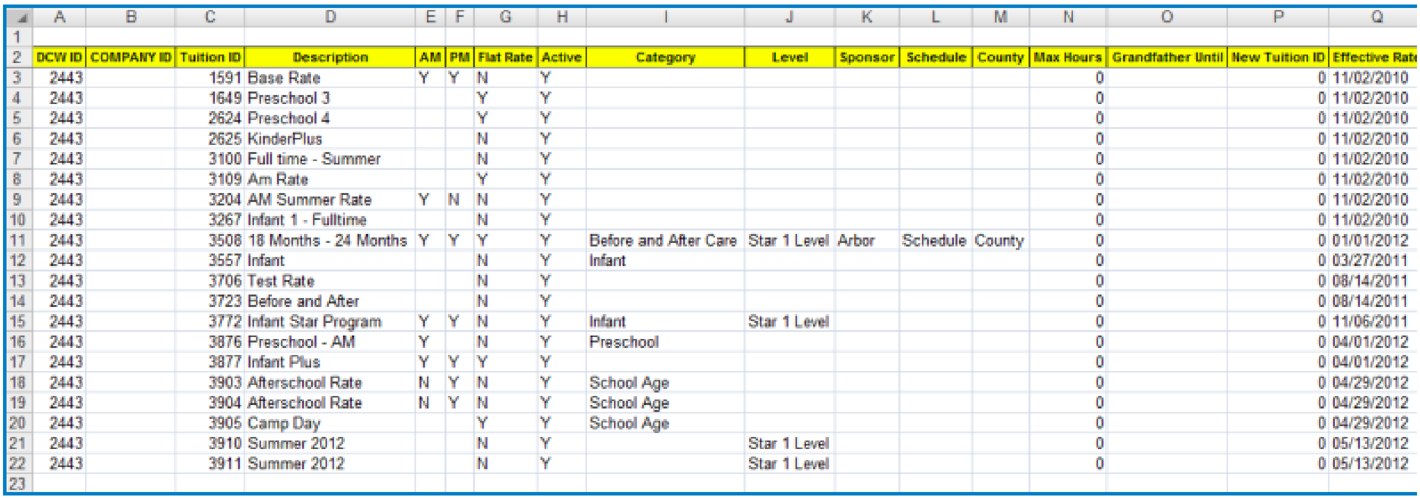
District: N/A

Company Rate Export Sheet

Last Modified on 06/25/2018 9:04 am EDT

The Company Rate Export Sheet Displays every rate for the business in the system. This sheet displays all rates, not just rates at a specific center level.

From the setup menu, select the rates option. Then select the actions button and the company rate export sheet option. This sheet will open in excel.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1																	
2	DCW ID	COMPANY ID	Tuition ID	Description	AM	PM	Flat Rate	Active	Category	Level	Sponsor	Schedule	County	Max Hours	Grandfather Until	New Tuition ID	Effective Rat
3	2443		1591	Base Rate	Y	Y	N	Y						0		0	11/02/2010
4	2443		1649	Preschool 3			Y	Y						0		0	11/02/2010
5	2443		2624	Preschool 4			Y	Y						0		0	11/02/2010
6	2443		2625	KinderPlus			N	Y						0		0	11/02/2010
7	2443		3100	Full time - Summer			N	Y						0		0	11/02/2010
8	2443		3109	Am Rate			Y	Y						0		0	11/02/2010
9	2443		3204	AM Summer Rate	Y	N	N	Y						0		0	11/02/2010
10	2443		3267	Infant 1 - Fulltime			N	Y						0		0	11/02/2010
11	2443		3508	18 Months - 24 Months	Y	Y	Y	Y	Before and After Care	Star 1 Level	Arbor	Schedule	County	0		0	01/01/2012
12	2443		3557	Infant			N	Y	Infant					0		0	03/27/2011
13	2443		3706	Test Rate			N	Y						0		0	08/14/2011
14	2443		3723	Before and After			N	Y						0		0	08/14/2011
15	2443		3772	Infant Star Program	Y	Y	N	Y	Infant	Star 1 Level				0		0	11/06/2011
16	2443		3876	Preschool - AM	Y		N	Y	Preschool					0		0	04/01/2012
17	2443		3877	Infant Plus	Y	Y	Y	Y						0		0	04/01/2012
18	2443		3903	Afterschool Rate	N	Y	N	Y	School Age					0		0	04/29/2012
19	2443		3904	Afterschool Rate	N	Y	N	Y	School Age					0		0	04/29/2012
20	2443		3905	Camp Day			Y	Y	School Age					0		0	04/29/2012
21	2443		3910	Summer 2012			N	Y		Star 1 Level				0		0	05/13/2012
22	2443		3911	Summer 2012			N	Y		Star 1 Level				0		0	05/13/2012
23																	

DCW ID: The DCW ID number is the the Platform Identification Number associated to the business level. To view the DCW ID number for the business, click on the General tab on the Home screen. The DCW ID number is the first set of numbers before the dash in the DCW ID row at the top of the Listing Information section. This is a required field.

Company ID: The Company ID number is the identification number associated to an individual center in the business. To view the business number, first select the center in the Business Level drop down list. Then click on the General tab on the Home screen. The Company ID number is the second set of numbers after the dash in the DCW ID row at the top of the Listing Information section. This is only a required field if the rate is only available at one specific center.

Tuition ID: The Tuition ID is a system created number for previously created tuitions. If the tuition new and is not being updated, this must be left blank.

Description: The Description is the name of the rate. This is a required field.

AM: The AM column indicates if the rate is only for children attending the AM portion of the classroom. Enter Y in the column to indicate if this rate is only for children attending the AM portion. If the rate is not for children attending the AM program, the column should be left blank or an N can be entered in the column.

PM: The PM column indicates if the rate is only for children attending the PM portion of the classroom. Enter Y in the column to indicate if the rate is only for children attending the PM portion. If the rate is not for children attending the PM program, the column should be left blank or an N can be entered in the column.

Flat Rate: The Flat Rate column indicates if the rate is a flat rate. A flat rate is a rate that charges a child only based on the scheduled number of days for the week. If a child attends more than their schedule, their rate will not increase. Enter Y in the column to indicate if the rate is a flat rate. If the rate is not a flat rate, the column should be left blank or an N can be entered in the column.

Active: The Active column indicates if the rate is currently active in the center. If a rate is not active, it cannot be selected in the Platform. To indicate a rate as active, enter a Y in the Active column. If the rate is not active, enter an N in the column.

Category: The Category column indicates if the rate is associated to a rate category. If a rate is associated to a rate category, enter the name of the category in the column. If the rate is not associated to a rate category, the column should be left blank.

Level: The Level column indicates if the rate is associated to a rate category associated to a center. If a rate is associated to a rate level, enter the name of the rate level in the column. If the rate is not associated to a rate level, the column should be left blank.

Sponsor: The Sponsor column indicates if the rate is associated to a third party agency. This will only make the rate available to families associated to the third party agency. If a rate is associated to a third party agency, enter the name of the third party agency in the column. If the rate is not associated to a third party agency, the column should be left blank.

Schedule: The Schedule column indicates if the rate is associated to a Schedule Valid Value assigned to a child in the Admission section. If the rate is associated to a schedule, enter the name of the schedule in the column. If the rate is not associated to a schedule, the column should be left blank.

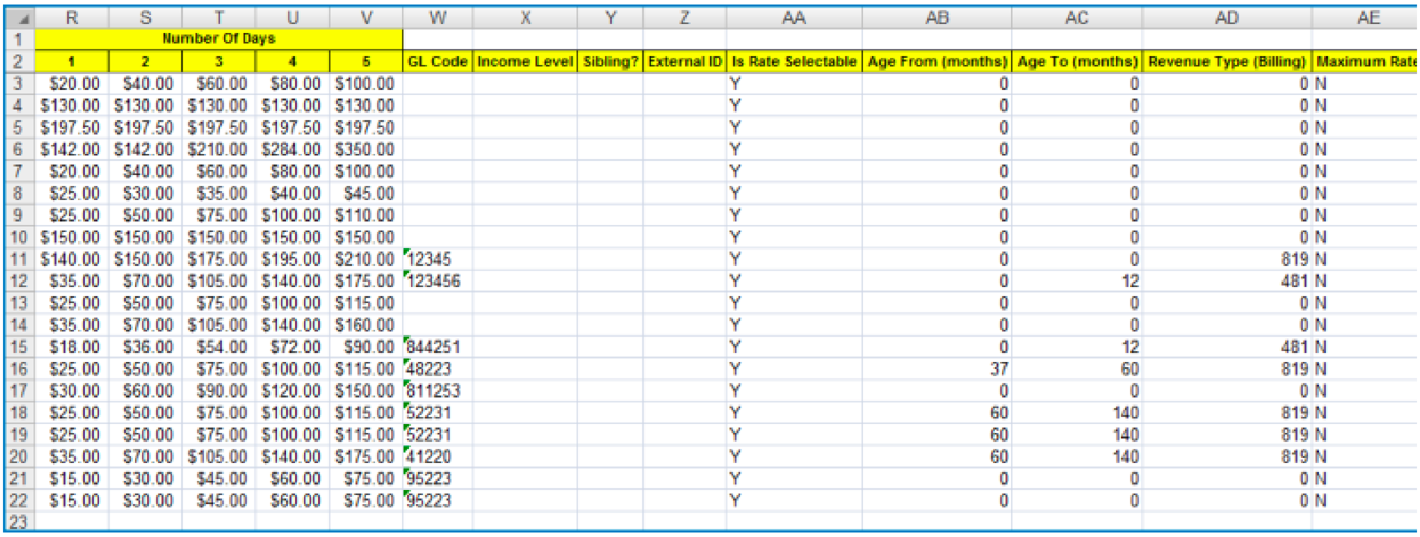
County: The County column indicates if the rate is associated to a count Valid Value assigned to a child in the Admission section. If the rate is associated to a county, enter the name of the county in the column. If the rate is not associated to a county, the column should be left blank.

Max Hours: The Max Hours column indicates if the rate has a maximum number of hours that children are allowed to attend a classroom with the rate. If the rate is associated to a maximum number of hours, enter the number of hours in the column. If the rate is not associated to a maximum number of hours, the column should be left blank.

Grandfather Until: The Grandfather Until column indicates at what date children with this current rate will be allowed to keep the rate until. This is only used when updating pre-existing rates using the Rate Import spreadsheet. If a rate will have a grandfather clause, enter the date the rate will be grandfathered until in the column. If the rate will not have a grandfather clause, this column can be left blank.

New Tuition ID: The New Tuition ID column indicates if the rate will have a new identification number. If the rate has a new identification number, enter the identification number in the column. If the rate does not have a new identification number, the column can be left blank.

Effective Date: The Effective Date column indicates the date the rate will go into effect. Enter the date the rate will become effective in the column. This is a required field.



	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE
1	Number Of Days													
2	1	2	3	4	5	GL Code	Income Level	Sibling?	External ID	Is Rate Selectable	Age From (months)	Age To (months)	Revenue Type (Billing)	Maximum Rate
3	$20.00	$40.00	$60.00	$80.00	$100.00					Y	0	0	0	N
4	$130.00	$130.00	$130.00	$130.00	$130.00					Y	0	0	0	N
5	$197.50	$197.50	$197.50	$197.50	$197.50					Y	0	0	0	N
6	$142.00	$142.00	$210.00	$284.00	$350.00					Y	0	0	0	N
7	$20.00	$40.00	$60.00	$80.00	$100.00					Y	0	0	0	N
8	$25.00	$30.00	$35.00	$40.00	$45.00					Y	0	0	0	N
9	$25.00	$50.00	$75.00	$100.00	$110.00					Y	0	0	0	N
10	$150.00	$150.00	$150.00	$150.00	$150.00					Y	0	0	0	N
11	$140.00	$150.00	$175.00	$195.00	$210.00	12345				Y	0	0	819	N
12	$35.00	$70.00	$105.00	$140.00	$175.00	123456				Y	0	12	481	N
13	$25.00	$50.00	$75.00	$100.00	$115.00					Y	0	0	0	N
14	$35.00	$70.00	$105.00	$140.00	$160.00					Y	0	0	0	N
15	$18.00	$36.00	$54.00	$72.00	$90.00	844251				Y	0	12	481	N
16	$25.00	$50.00	$75.00	$100.00	$115.00	48223				Y	37	60	819	N
17	$30.00	$60.00	$90.00	$120.00	$150.00	811253				Y	0	0	0	N
18	$25.00	$50.00	$75.00	$100.00	$115.00	52231				Y	60	140	819	N
19	$25.00	$50.00	$75.00	$100.00	$115.00	52231				Y	60	140	819	N
20	$35.00	$70.00	$105.00	$140.00	$175.00	41220				Y	60	140	819	N
21	$15.00	$30.00	$45.00	$60.00	$75.00	95223				Y	0	0	0	N
22	$15.00	$30.00	$45.00	$60.00	$75.00	95223				Y	0	0	0	N
23														

1: The 1 column indicates the amount that will be charged for a child for 1 day of tuition for the week. This is a required field.

2: The 2 column indicates the amount that will be charged for a child for 2 days of tuition for the week. This is a required field.

3: The 3 column indicates the amount that will be charged for a child for 3 days of tuition for the week. This is a required field.

4: The 4 column indicates the amount that will be charged for a child for 4 days of tuition for the week. This is a required field.

5: The 5 column indicates the amount that will be charged for a child for 5 days of tuition for the week. This is a required field.

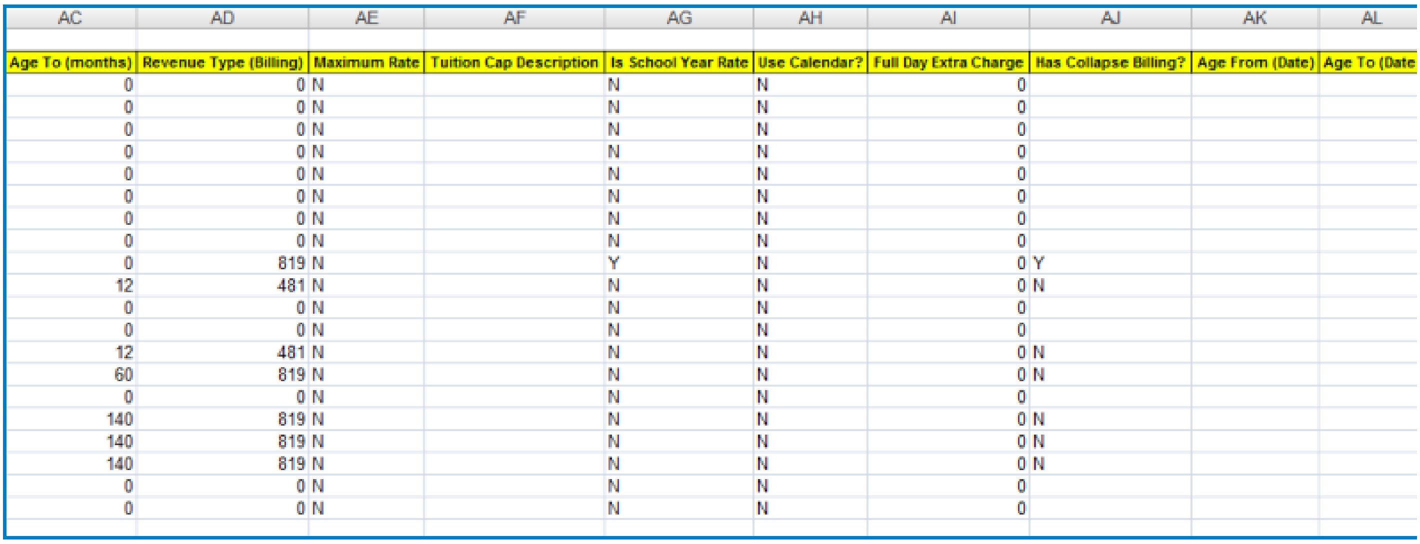
GL Code: The GL Code column displays the general ledger code associated to the classroom. If the rate has a general ledger code, enter the GL Code in the column. If the rate does not have a GL Code, the column can be left blank.

Income Level: The Income Level column displays the income level associated to the rate. The income level will associate the rate to a family with the assigned income level.

Sibling?: The Sibling column displays if the rate is only for a sibling in the Platform.

External ID: The External ID column displays the external identification number for the rate.

Is Rate Selectable: The Is Rate Selectable column displays if the rate can be assigned to a child.



AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL
Age To (months)	Revenue Type (Billing)	Maximum Rate	Tuition Cap Description	Is School Year Rate	Use Calendar?	Full Day Extra Charge	Has Collapse Billing?	Age From (Date)	Age To (Date
0	0	N		N	N	0			
0	0	N		N	N	0			
0	0	N		N	N	0			
0	0	N		N	N	0			
0	0	N		N	N	0			
0	0	N		N	N	0			
0	0	N		N	N	0			
0	0	N		N	N	0			
0	819	N		Y	N	0	Y		
12	481	N		N	N	0	N		
0	0	N		N	N	0			
0	0	N		N	N	0			
12	481	N		N	N	0	N		
60	819	N		N	N	0	N		
0	0	N		N	N	0			
140	819	N		N	N	0	N		
140	819	N		N	N	0	N		
140	819	N		N	N	0	N		
0	0	N		N	N	0			
0	0	N		N	N	0			

Age From (months): The Age From (months) column displays the starting age in months that a child can be to be assigned the rate.

Age To (months): The Age To (months) column displays the ending age, in months, that a child can be to be assigned the rate.

Revenue Type (Billing): The Revenue Type (Billing) column displays the revenue type associated to the rate.

Maximum Rate: The Maximum Rate column displays the maximum charge that a child can be charged when associated to the rate.

Tuition Cap Description: The Tuition Cap Description is a message that is displayed on a family's financial ledger if they exceed the time scheduled for the full day in the

Platform.

Is School Year Rate: The Is School Year Rate column displays if the rate is only used during center years.

Use Calendar?: The Use Calendar column displays a Y if the rate is used with a calendar.

Full Day Extra Charge: The Full Day Extra Charge column displays the extra charge if a child attends a full day on the rate.

Has Collapse Billing?: The Has Collapse Billing column displays a Y if the rate has collapsible billing.

Age From (Date):

Age To (Date):

Dynamic Rates

Last Modified on 12/21/2018 1:42 pm EST

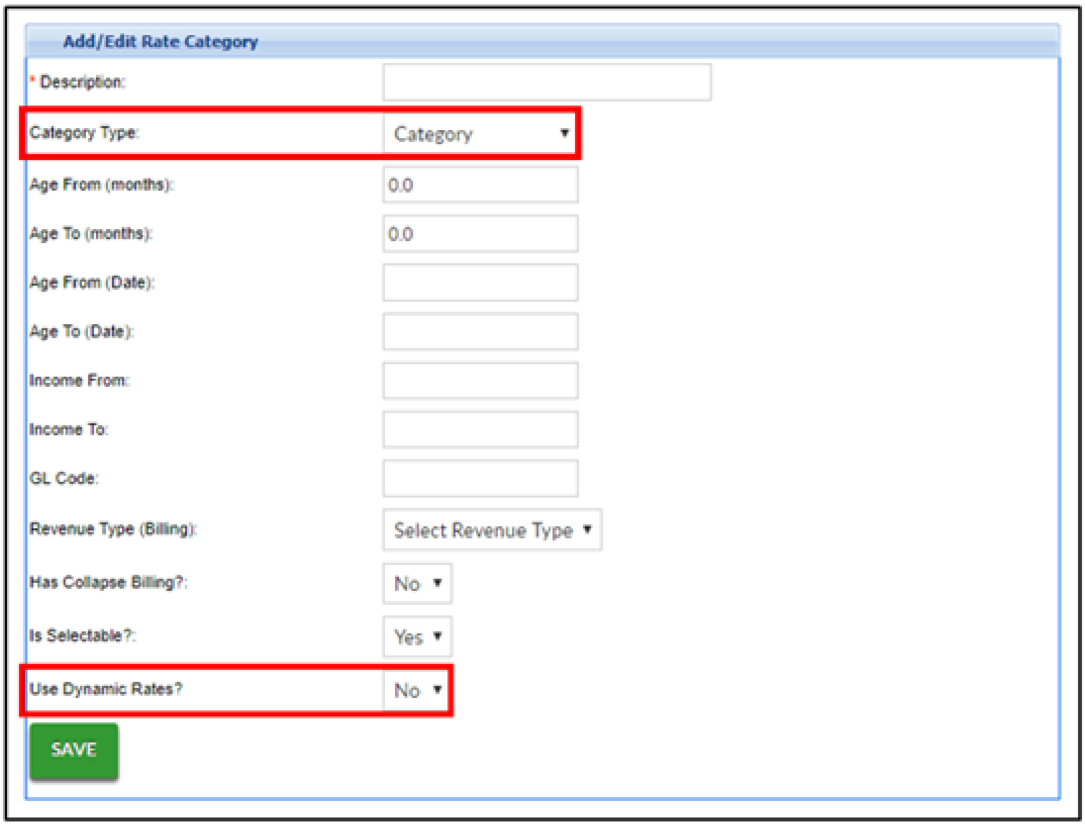
Dynamic Rates are used when a center wants to apply sequential rates to students within a family. If a sibling is registering into the same room/program, the system will assign the sequential rate within the Rate Category to the sibling.

When setting up Dynamic Rates, be sure no other rates are setup in the following screens:

- Room configuration
- Room Semester (View Semester screen)
- Plan Options
- Registration Exceptions

Setting Up Dynamic Rates

1. Create a Rate Category
    - When creating a Rate Category, the Category Type must be Category and Use Dynamic Rates? must be set to Yes

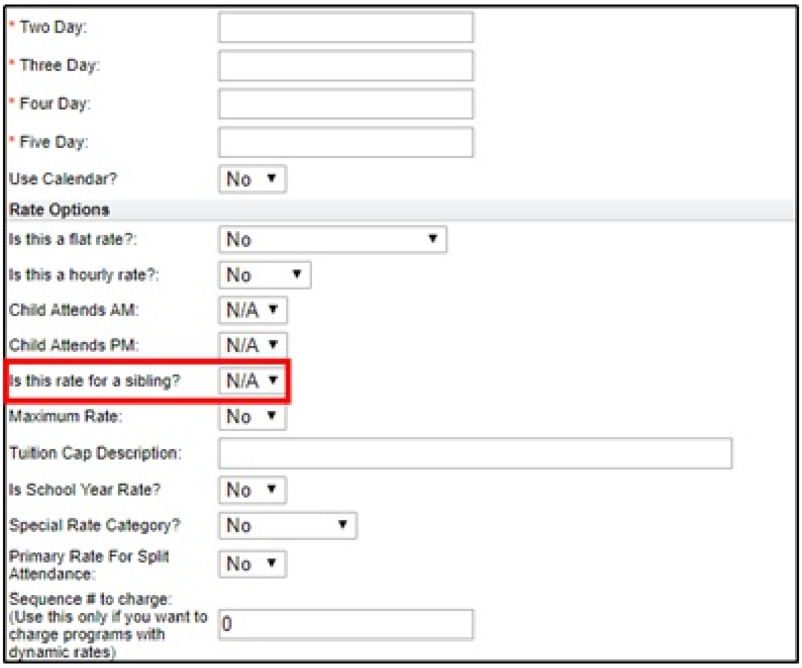


Add/Edit Rate Category

* Description:	
Category Type:	Category
Age From (months):	0.0
Age To (months):	0.0
Age From (Date):	
Age To (Date):	
Income From:	
Income To:	
GL Code:	
Revenue Type (Billing):	Select Revenue Type
Has Collapse Billing?:	No
Is Selectable?:	Yes
Use Dynamic Rates?	No

2. Create a Rate

- Is this rate for a sibling?
    - N/A - use this when creating the rate for the first student
    - Yes - use this option when creating the rates for siblings. The second student will receive the first sibling rate in the sequence

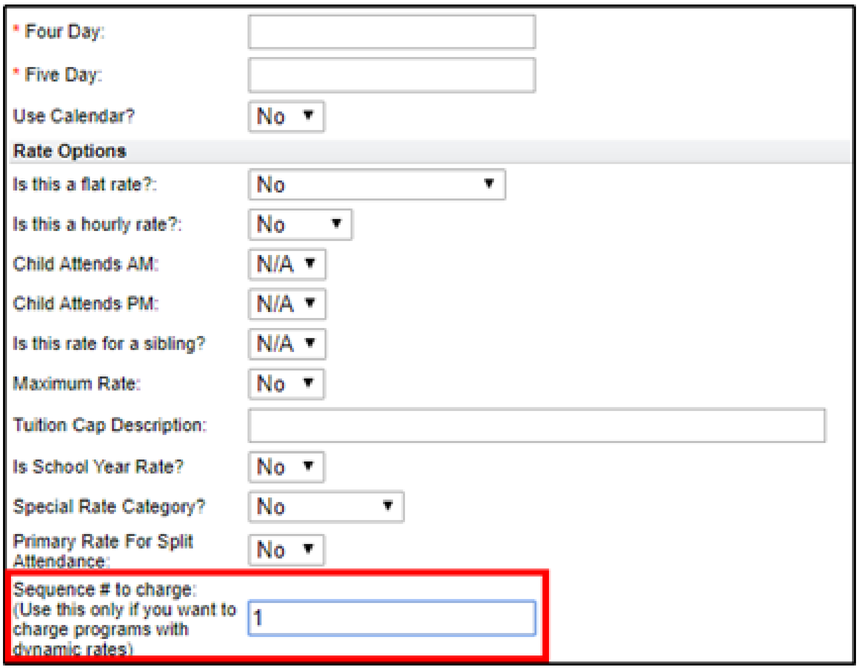


* Two Day:
* Three Day:
* Four Day:
* Five Day:
Use Calendar? No

Rate Options

Is this a flat rate?: No
Is this a hourly rate?: No
Child Attends AM: N/A
Child Attends PM: N/A
Is this rate for a sibling? N/A
Maximum Rate: No
Tuition Cap Description:
Is School Year Rate? No
Special Rate Category? No
Primary Rate For Split Attendance: No
Sequence # to charge: (Use this only if you want to charge programs with dynamic rates) 0

- Enter the Sequence # in the Sequence # to Charge field. **Please Note**: The sequence # is <u>not editable</u> once saved



* Four Day:
* Five Day:
Use Calendar? No

Rate Options

Is this a flat rate?: No
Is this a hourly rate?: No
Child Attends AM: N/A
Child Attends PM: N/A
Is this rate for a sibling? N/A
Maximum Rate: No
Tuition Cap Description:
Is School Year Rate? No
Special Rate Category? No
Primary Rate For Split Attendance: No
Sequence # to charge: (Use this only if you want to charge programs with dynamic rates) 1

- When creating a rate, choose the Dynamic Rate Category from the Category drop-down

3. At the Room level configuration, locate the Rate Category field. Use the drop-down to select the Dynamic Rate Category


Rate Category: Scouts Plan Options ▼

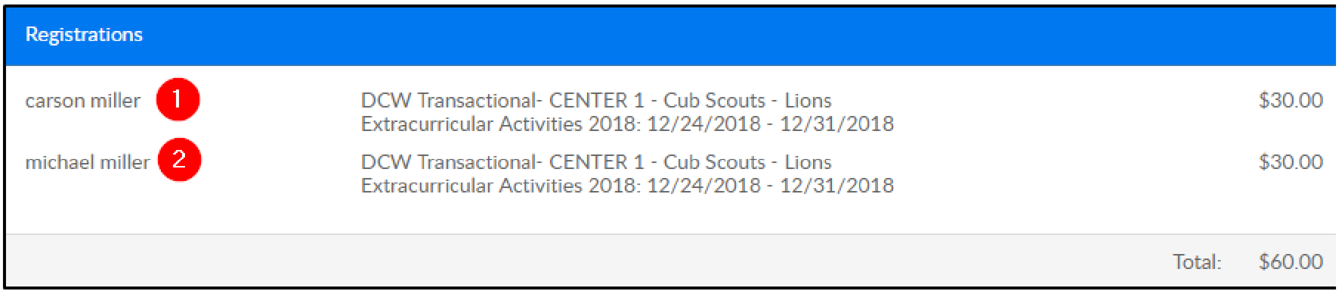
Dynamic Rate Facts

- Ensure Sequence #s are being assigned correctly. Once the sequence is entered on the Create A Rate screen, it cannot be edited
- Although it is not recommended to have duplicate sequence numbers, the system will allow duplicates. An advantage to allowing duplicates is if a rate needs to be added between 2 existing rates.
    - For example: Sequence #1 is $50, Sequence #2 is $30. If there should be a rate for $40, instead of deleting all rates, create an additional sequence #1 for $40. The system will take the oldest rate first
- If a student is registering into multiple rooms/programs, or there are multiple siblings registering, the order of registration does not decide the sequence assigned. The order of approval is the deciding factor on which sequence # is applied
    - For example: If a student registers into Room 1, then Room 2, but during approval, Room 2 is approved first, Room 2 will receive the lower sequence #
    - See "Sibling Dynamic Rates" section below for a sibling example
- If a dynamic rate category is created, but a sibling rate is not setup, siblings will receive the regular dynamic rate

Sibling Dynamic Rates

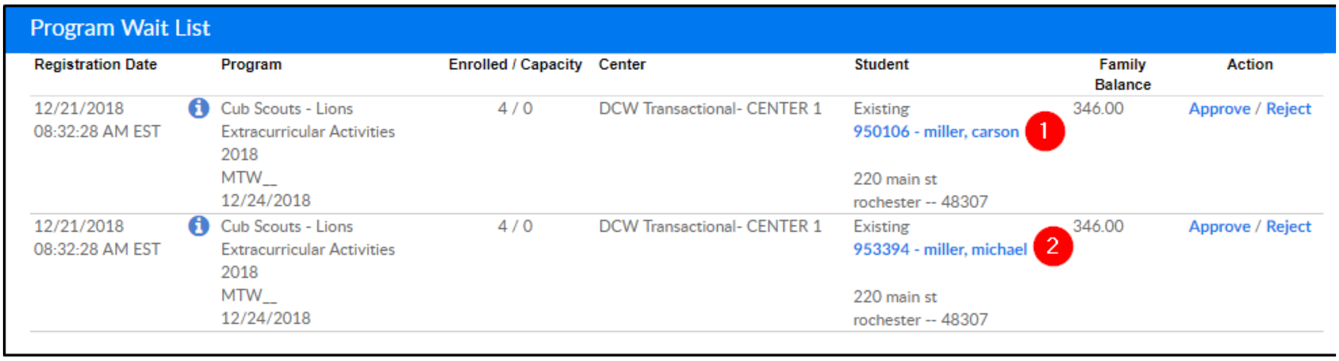
For siblings, the sequence # is assigned upon registration approval, not registration. The example below shows that if Student A registers first, but Student B is approved first, Student B is assigned the first student rate and Student A is assigned the sibling rate.

- Two siblings register into the same wait list room/program: Carson was registered first, then Michael


Registrations

carson miller ①	DCW Transactional- CENTER 1 - Cub Scouts - Lions Extracurricular Activities 2018: 12/24/2018 - 12/31/2018	$30.00
michael miller ②	DCW Transactional- CENTER 1 - Cub Scouts - Lions Extracurricular Activities 2018: 12/24/2018 - 12/31/2018	$30.00
	Total:	$60.00

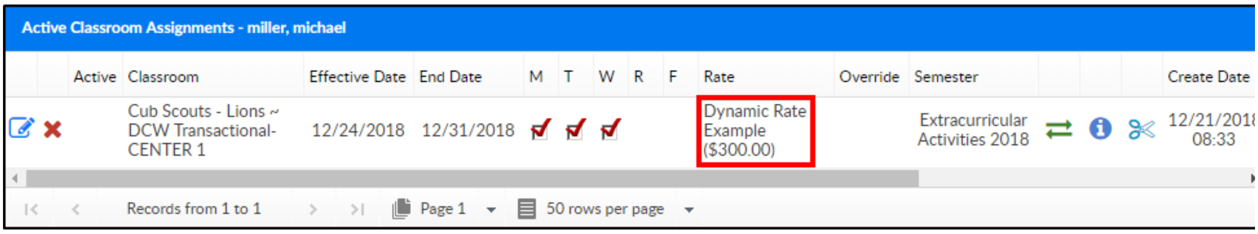
- On the Program Wait List, students show in the order they are registered



Program Wait List

Registration Date	Program	Enrolled / Capacity	Center	Student	Family Balance	Action
12/21/2018 08:32:28 AM EST	Cub Scouts - Lions Extracurricular Activities 2018 MTW__ 12/24/2018	4 / 0	DCW Transactional- CENTER 1	Existing 950106 - miller, carson ① 220 main st rochester -- 48307	346.00	Approve / Reject
12/21/2018 08:32:28 AM EST	Cub Scouts - Lions Extracurricular Activities 2018 MTW__ 12/24/2018	4 / 0	DCW Transactional- CENTER 1	Existing 953394 - miller, michael ② 220 main st rochester -- 48307	346.00	Approve / Reject

- Michael is approved first, then Carson
  - Michael's PRA – shows he received the first student rate

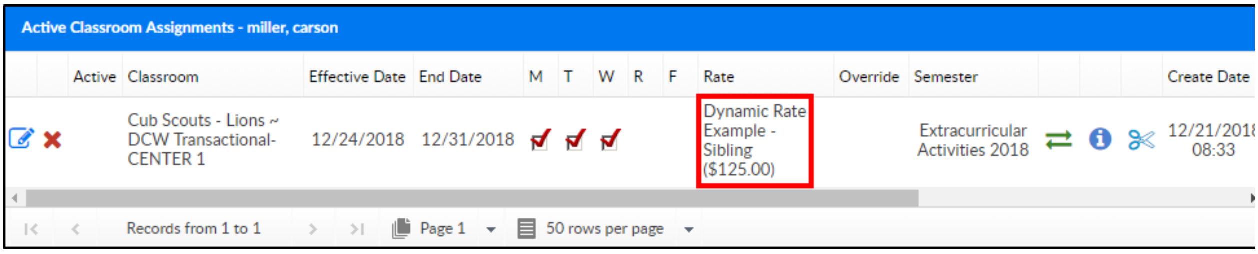


Active Classroom Assignments - miller, michael

Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester	Create Date
	Cub Scouts - Lions ~ DCW Transactional- CENTER 1	12/24/2018	12/31/2018	✓	✓	✓			Dynamic Rate Example ($300.00)		Extracurricular Activities 2018	12/21/201 08:33

Records from 1 to 1 Page 1 50 rows per page

  - Carson's PRA – shows he received the sibling rate



Active Classroom Assignments - miller, carson

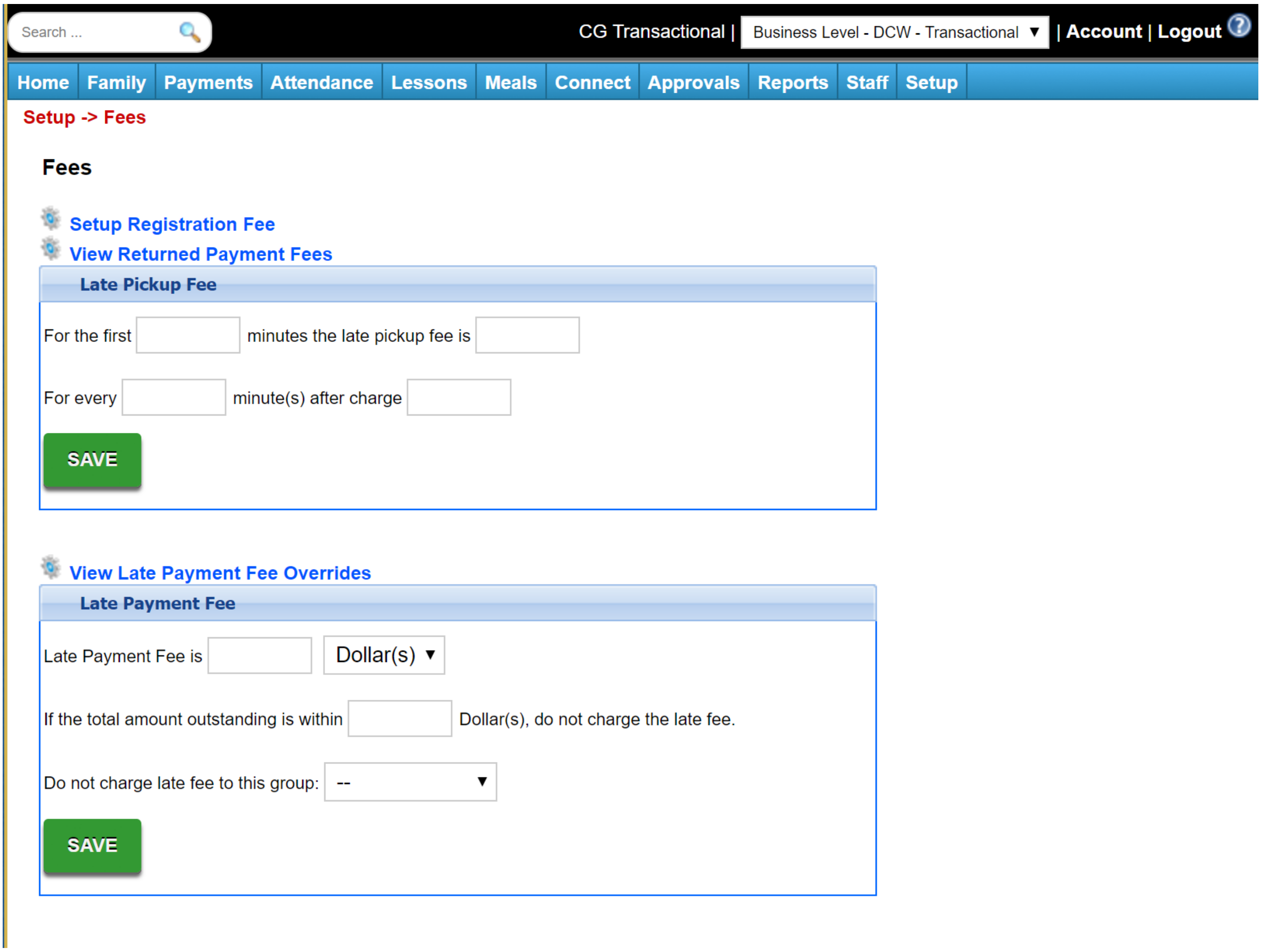
Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester	Create Date
	Cub Scouts - Lions ~ DCW Transactional- CENTER 1	12/24/2018	12/31/2018	✓	✓	✓			Dynamic Rate Example - Sibling ($125.00)		Extracurricular Activities 2018	12/21/201 08:33

Records from 1 to 1 Page 1 50 rows per page

Setup > Fees

Last Modified on 10/12/2017 7:55 pm EDT

The Setup > Fees page is where administrators are able to set a site wide registration fee, add returned payment fees, setup late pickup fee charges and add late payment fees.



For the first ☐ minutes the late pickup fee is ☐

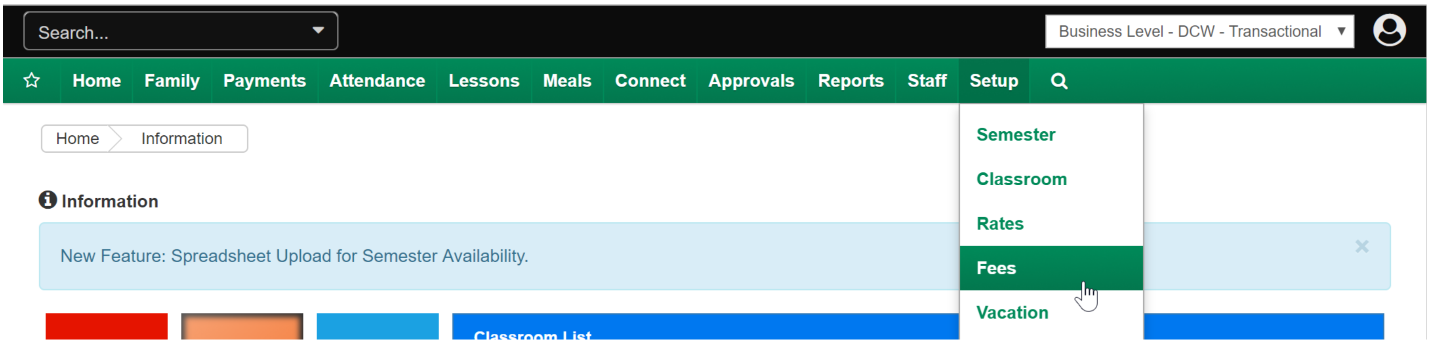
For every ☐ minute(s) after charge ☐

Late Payment Fee is ☐ Dollar(s)

If the total amount outstanding is within ☐ Dollar(s), do not charge the late fee.

Do not charge late fee to this group: --

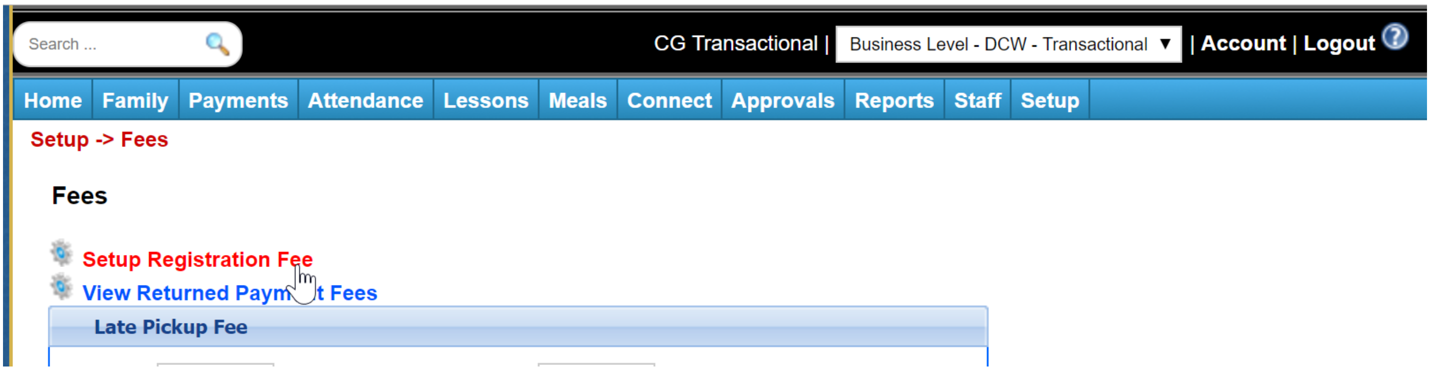
From the Setup Menu select the Fees option.



New Feature: Spreadsheet Upload for Semester Availability.

Setup Registration Fees

On the Fees page the first feature allows users to setup Registration Fees, this area would be used if your site charges a set registration/re-registration fee year over year- most often used by child care centers.



Select Registration Fee in the Registration Type drop down list. This will charge a registration fee to all of the new children that were enrolled in a classroom between the effective date and end date.

Enter the start and end date for the registration fee in the Effective Date and End Date text boxes.

Enter the amount that children will be charged for the registration in the Fee Amount text box.

Select the Type - Fee Valid Value that will be assigned to the fee in the Fee Type drop down list.

When finished, click on the Save button.

After clicking on the Save button, the screen will refresh.

Select Re-Registration Fee in the Registration Type drop down list. This will charge a registration fee to all of the existing children that were enrolled in a classroom between the effective date and end date.

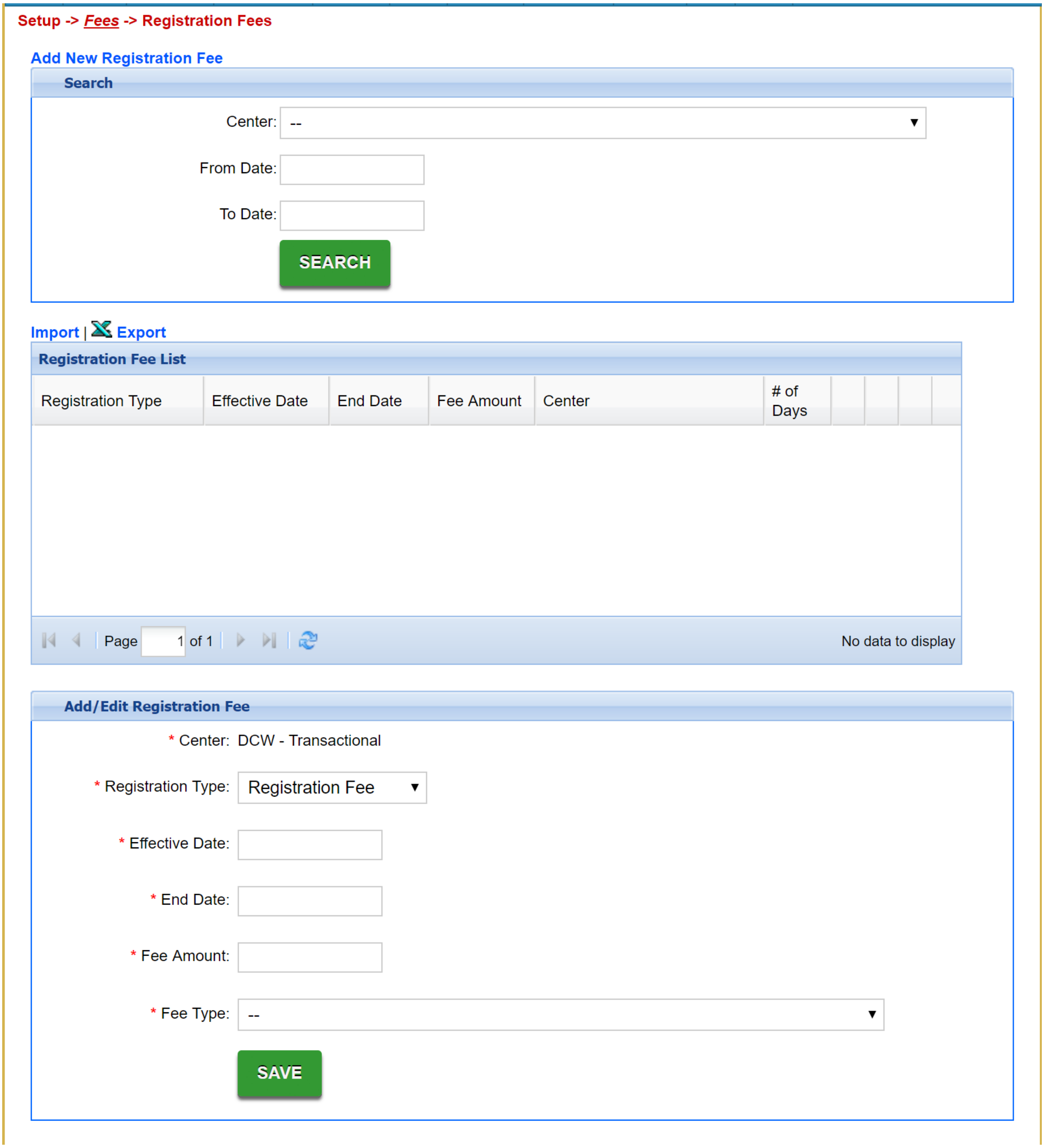
Enter the start date and end date for the re-registration fee in the Effective Date and End Date text boxes.

Enter the amount the children will be charged for the re-registration fee in the Fee Amount text box.

Select the Type - Fee Valid Value that will be assigned to the fee in the Fee Type drop down list.

If there is a number of days since a child has been enrolled in the Platform that they will not be charged a re-registration fee, enter the number of days in the Re-Registration Fee will not be charged within # of Days text box. This is used to prevent parents from being charged a registration fee for a classroom and then being charged a registration fee again soon.

When finished, click on the Save button.


Setup -> Fees -> Registration Fees

Add New Registration Fee

Search

Center: --

From Date:

To Date:

Import | Export

Registration Fee List

Registration Type	Effective Date	End Date	Fee Amount	Center	# of Days

Page 1 of 1

No data to display

Add/Edit Registration Fee

* Center: DCW - Transactional

* Registration Type: Registration Fee

* Effective Date:

* End Date:

* Fee Amount:

* Fee Type: --

To authorize registration fees at a specific location, click on the authorization icon for the registration fee in the Registration Fee List section.

Select the registration criteria in the Registration Fee Authorization Information section.

To authorize a registration fee at a center, state, county, brand, division or district, select the Center, State, Count, Brand, Division or District in the Registration Fee Authorization Information section.

When finished, click on the Save button. Discounts can be authorized at multiple locations based on the criteria setup in the Discount Authorization Information selected. To authorize an additional center, state, county, brand, division or district, select the additional Center, State, Count, Brand, Division or District in the Registration Fee Authorization Information section.

After clicking on the Save button, the screen will refresh.

Click on the Setup tab on the main toolbar, indicated by the red square. Then, click on the Schedule tab, indicated by the blue square.

Enter the date the new academic year will start in the Item Date text box. This date should fall in between both the start and end date for the registration and re-registration.

Then, enter a description for the new academic year in the Description text box.

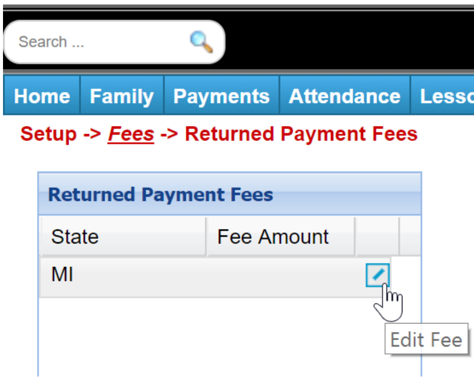
Select Academic Year Start in the Action drop down list.

When finished, click on the Save button.

View Returned Payment Fees

Select View Returned Payment Fees

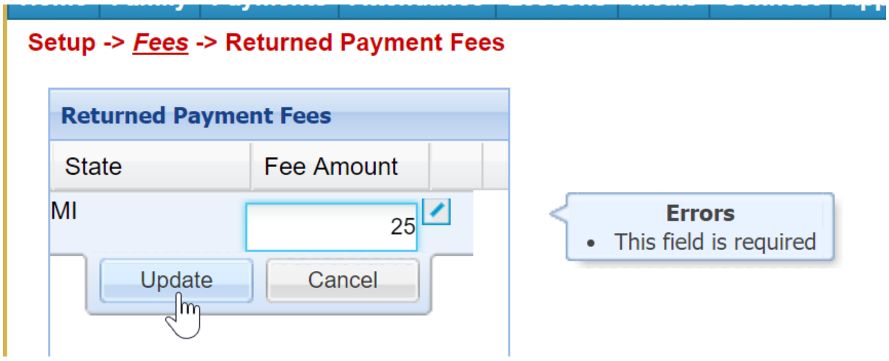
Select the edit icon next to the state your site is located in.



Returned Payment Fees

State	Fee Amount
MI	

Enter the amount the site would charge for a returned payment, then select Update.



Returned Payment Fees

State	Fee Amount
MI	25

Errors

- This field is required

Late Pickup Fee

Late pickup fees allow a center to add rules to how a family should be charged if a child is picked up after center hours.

Enter the Late Pickup Fee guidelines in the Late Pickup Fee section.

For example, the Platform has a Late Pickup Fee policy that states: For the first 10 minutes the late pickup fee is 5.00. For every 1 minute (s) after charge 1.50.

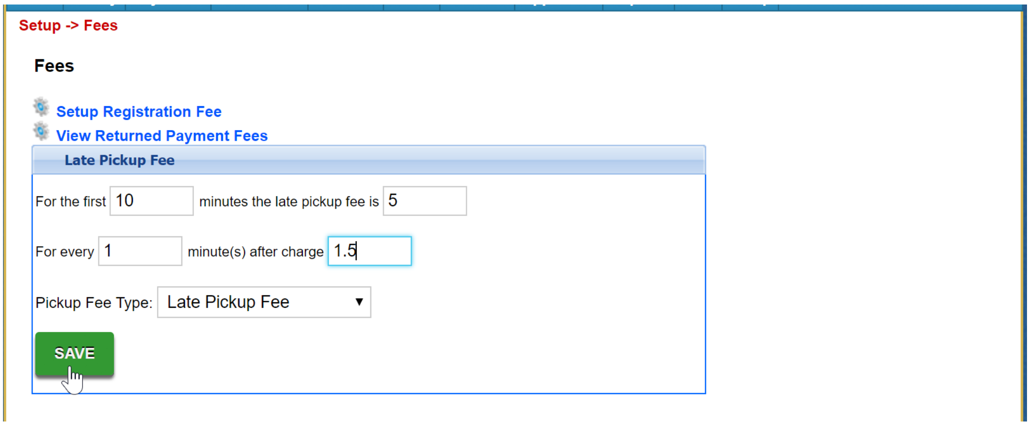
If the Johnson family was 9 minutes late, they would be charged a late pickup fee of $5.00. ($5 + ($1.50 x 0 minutes)

If the Jones family was 15 minutes late, they would be charged a late pickup fee of $12.50. ($5 + ($1.50 x 5 minutes)

Then, select the type of fee that will be associated to the late pickup fee in the Pickup Fee Type drop down list. The Pickup Fee Type drop down list will not appear unless a Type – Fee Valid Value is setup in the Valid Value section.

When finished, click on the Save button.

REMEMBER! Set hours under Home > Hours at each center level!



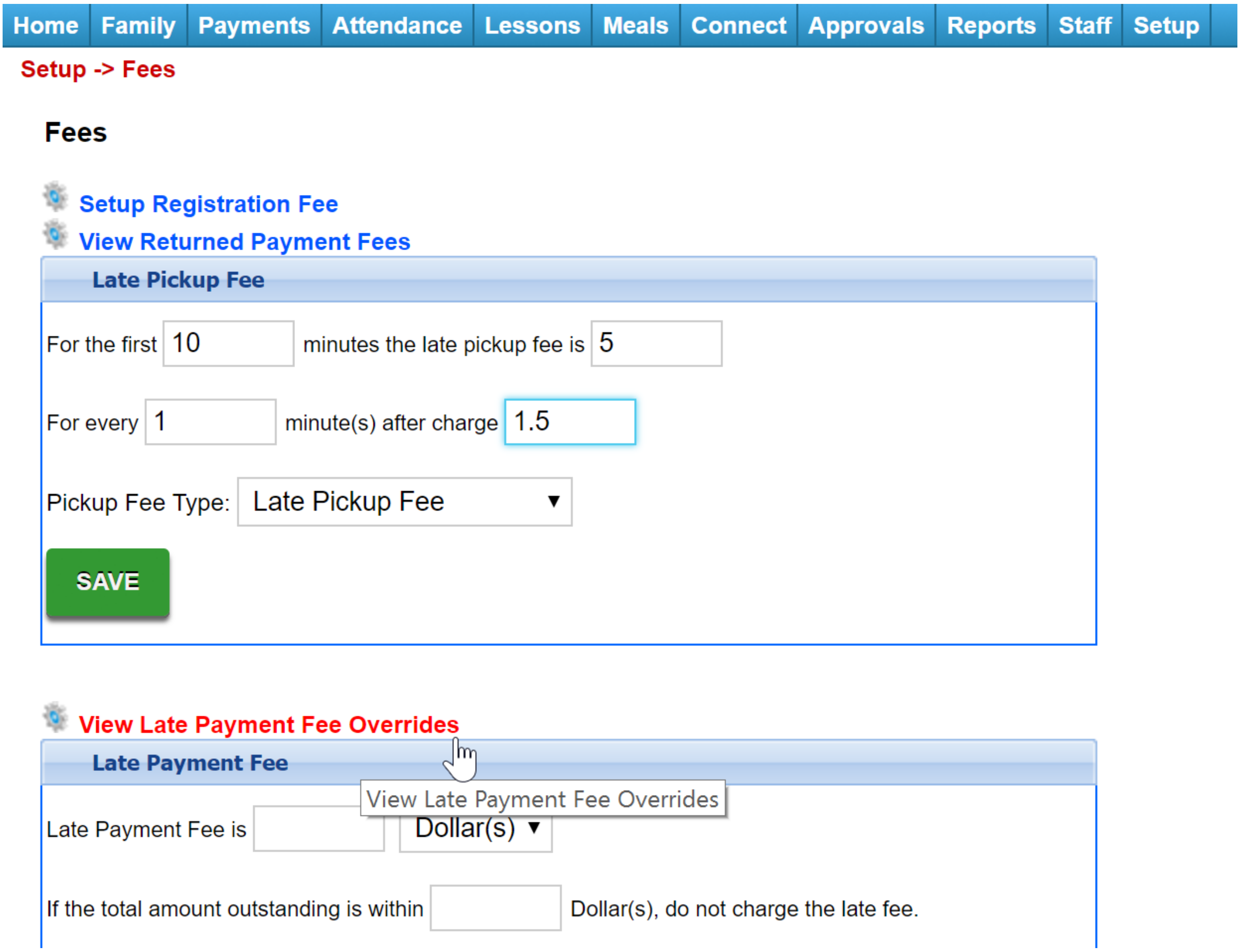
For the first 10 minutes the late pickup fee is 5

For every 1 minute(s) after charge 1.5

Pickup Fee Type: Late Pickup Fee

View Late Payment Fee Overrides

This section allows a site to add exceptions to the late payment fee. Select View Late Payment Fee Overrides.



For the first 10 minutes the late pickup fee is 5

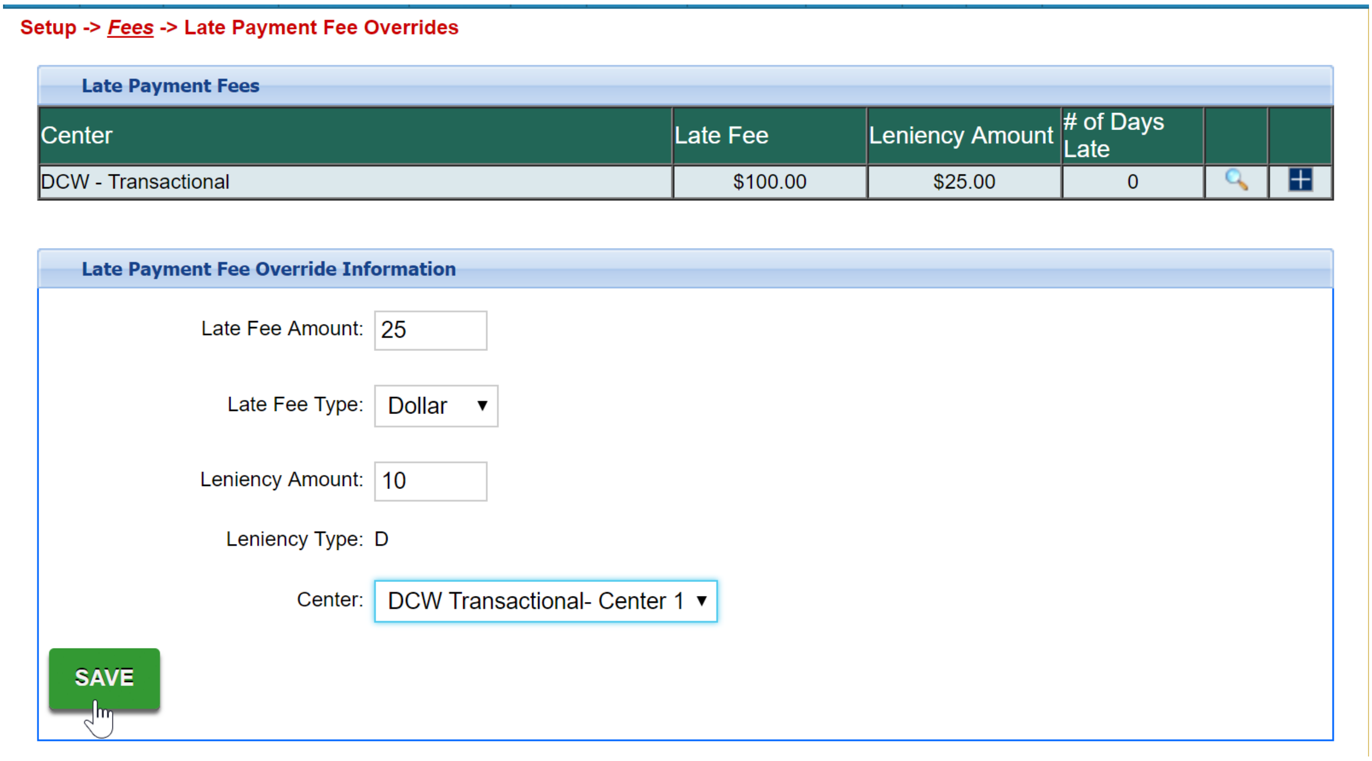
For every 1 minute(s) after charge 1.5

Pickup Fee Type: Late Pickup Fee

Late Payment Fee is Dollar(s)

If the total amount outstanding is within Dollar(s), do not charge the late fee.

This area allows administrators the ability to add overrides for centers or dollar amounts.


Setup -> *Fees* -> Late Payment Fee Overrides

Late Payment Fees

Center	Late Fee	Leniency Amount	# of Days Late		
DCW - Transactional	$100.00	$25.00	0	🔍	⊞

Late Payment Fee Override Information

Late Fee Amount: 25

Late Fee Type: Dollar

Leniency Amount: 10

Leniency Type: D

Center: DCW Transactional- Center 1

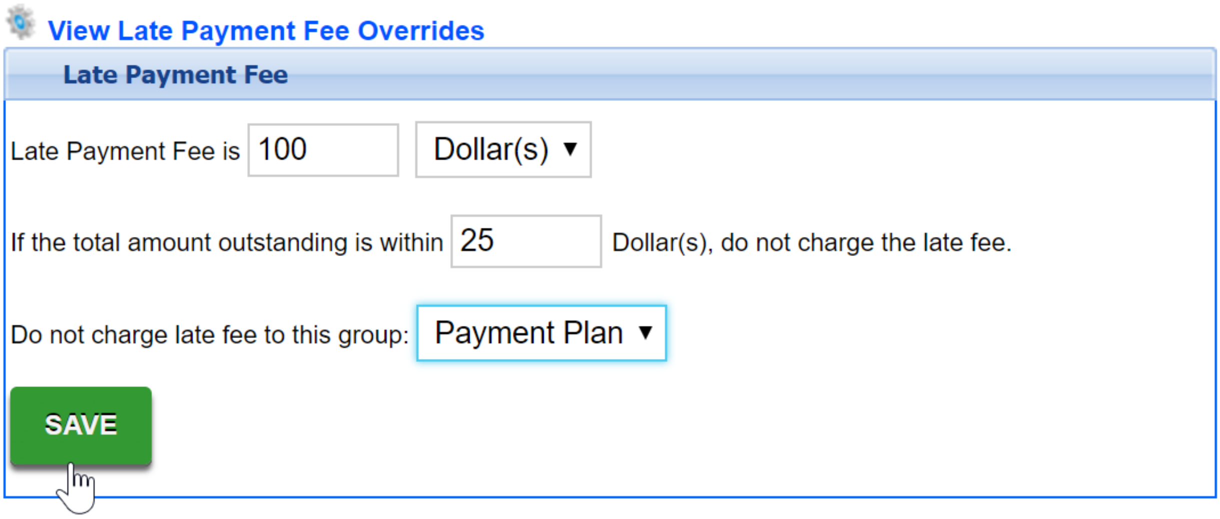
Late Payment Fee

Late payment fees allow users to add a fee associated with families holding an outstanding balance on their financial ledger.

For example, the Platform has a Late Payment Fee policy that states: For every 3 day(s) late charge 20.00. If the total amount outstanding is within 25.00 Dollar(s) do no charge the late fee.

- *If the Johnson family is 3 days late paying their $100 bill, they would be charged a late payment fee of $20.00.*
- *If the Jones family is 3 days late paying their $19 bill, they would not be charged a late payment fee.*

When finished, click on the **Save** button.


View Late Payment Fee Overrides

Late Payment Fee

Late Payment Fee is 100 Dollar(s)

If the total amount outstanding is within 25 Dollar(s), do not charge the late fee.

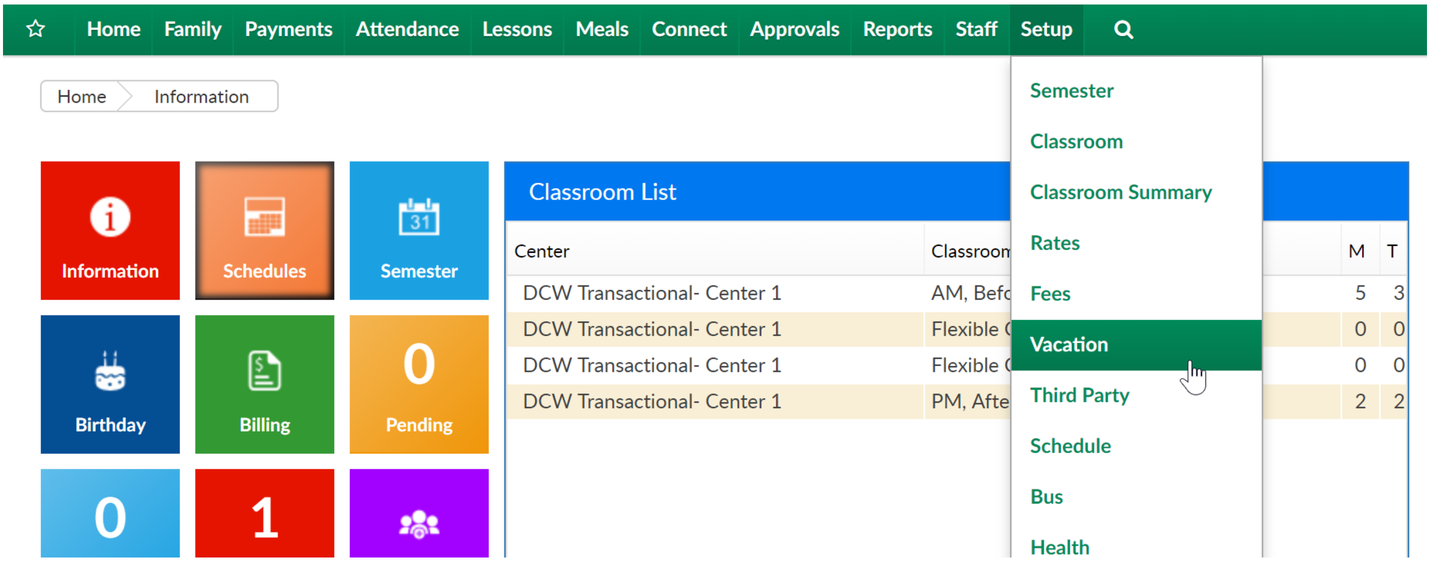
Do not charge late fee to this group: Payment Plan

If these fees should be charged automatically, batch jobs must be set on the back end. Once values have been set add a ticket to the Care portal with the date and time the batches should begin to process.

Setup > Vacation

Last Modified on 05/25/2018 12:24 pm EDT

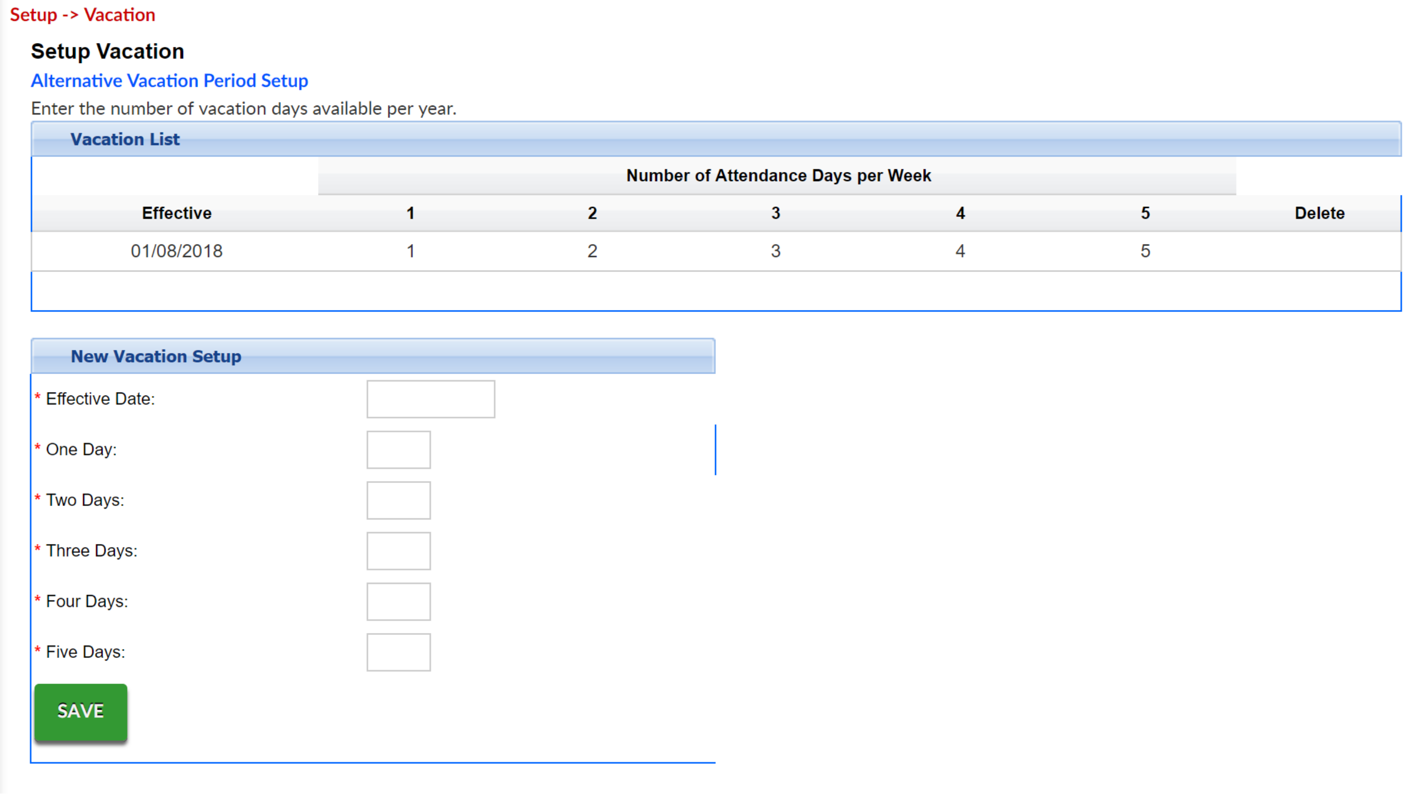
From the Setup menu, select the Vacation option-



Classroom List

Center	Classroon	M	T
DCW Transactional- Center 1	AM, Befc	5	3
DCW Transactional- Center 1	Flexible (	0	0
DCW Transactional- Center 1	Flexible (	0	0
DCW Transactional- Center 1	PM, Afte	2	2

Enter the effective date for the vacation policy and the number of days a child would have if they are scheduled for 1,2,3,4 or 5 days per week.



Setup -> Vacation

Setup Vacation

Alternative Vacation Period Setup

Enter the number of vacation days available per year.

Vacation List

	Number of Attendance Days per Week					
Effective	**1**	**2**	**3**	**4**	**5**	**Delete**
01/08/2018	1	2	3	4	5	

New Vacation Setup

* Effective Date:

* One Day:

* Two Days:

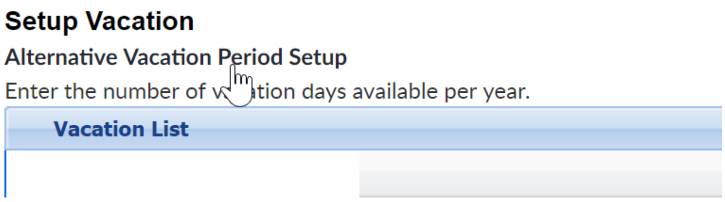
* Three Days:

* Four Days:

* Five Days:

If you would like to enter the period in my set dates, click on the Alternative Vacation Period Setup link-

Setup -> Vacation



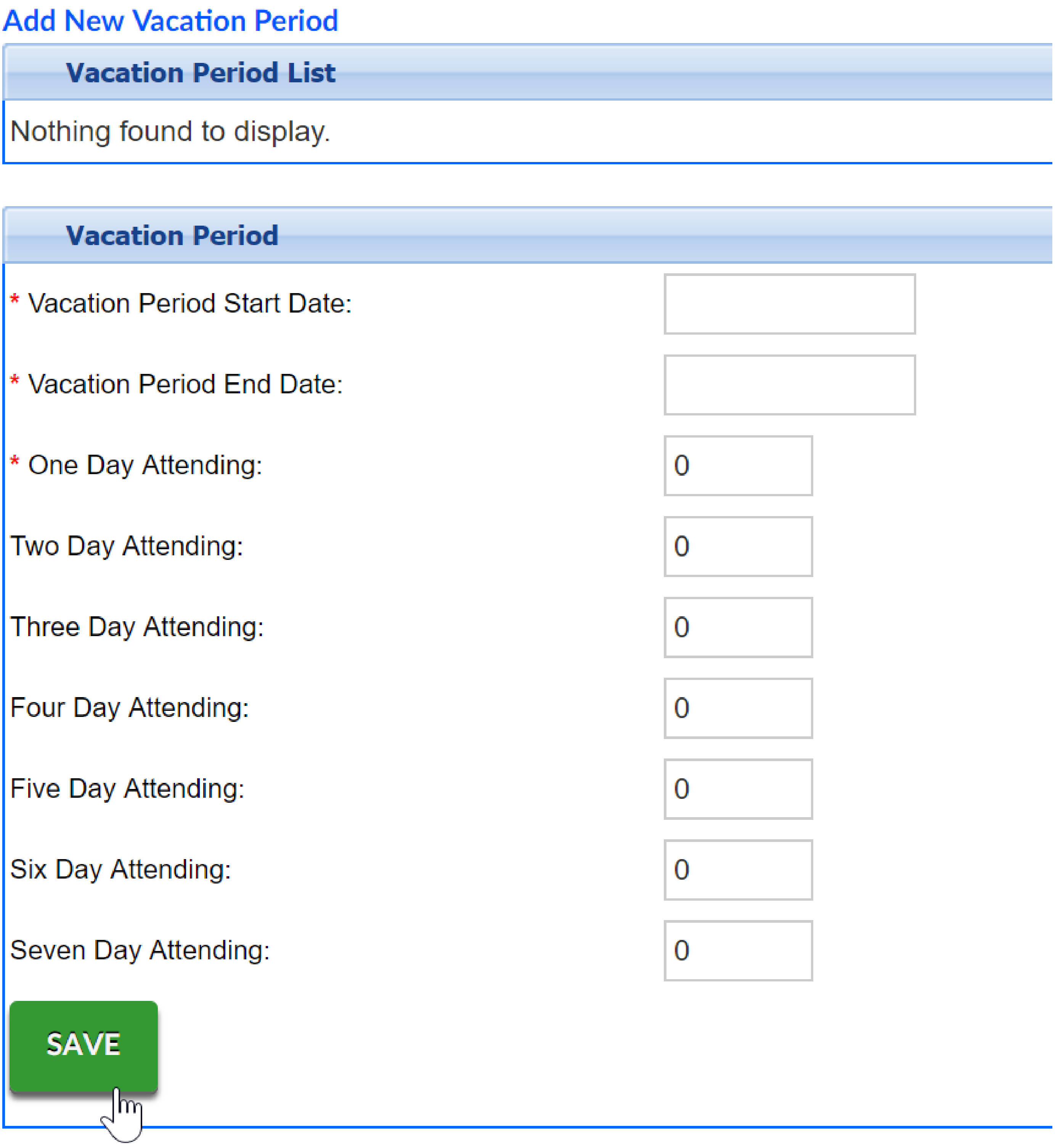
Setup Vacation

Alternative Vacation Period Setup

Enter the number of vacation days available per year.

Enter the Vacation Period Start Date, Vacation Period End Date and then the numer days if a child is attending 1,2,3,4,5,6 or 7 days per week.

Setup -> *Vacation* -> Vacation Period



Add New Vacation Period

Vacation Period List

Nothing found to display.

Vacation Period

* Vacation Period Start Date:

* Vacation Period End Date:

* One Day Attending: 0

Two Day Attending: 0

Three Day Attending: 0

Four Day Attending: 0

Five Day Attending: 0

Six Day Attending: 0

Seven Day Attending: 0

Setup > Third Party

Last Modified on 11/02/2018 2:36 pm EDT

Go to the Setup > Third Party screen in order to add or edit sponsoring, third party agencies. This will typically include local, state and federal government agencies, business partnerships or could relate to scholarships.

Any entity entered as a third party in the system will require a family is split- a split family means there will be multiple ledgers on the family financial screen. This process of split financials allows for parents to only see their balance due and for a site to keep track of the total amount owed for each child/family and sponsoring agency.

---

1. Sponsor Information
    - Sponsor Name – enter the name of the third party
    - Agency Identifier – enter a short name for the third party
    - Type – select the type of third party
        - Social Services – a government agency which subsidizes all or partial tuition/fee costs
        - Employer Based – a company which subsidizes all or partial tuition/fee costs
        - State Readiness – a government agency which subsidizes all or partial tuition/fee costs per student associated to a specific PreK program. The program has a start and stop time as well as a schedule calendar
        - Corporate Partnership – a company who has paid the corporate contract fee to receive a tuition discount and subsidizes all or partial tuition/fee costs
        - Discount Only – a third party from a corporate sponsorship that provides only a discount for families
        - Military – discount for members in the military
2. Active
    - Yes – the third party is active
    - No – the third party is not currently active
3. Title XX- Title XX of the Social Security Act is administered by the Office of

Community Services, Administration for Children and Families, Department of Health and Human Services

   - Yes – this third party agency is part of this program
   - No – no, it is not part of this program

4. Auto Create Holding Account – Setting up a Third Party Holding Account allows administrators the ability to apply over payments from a third party agency to a center's holding account. These over payments can be used at a later date when a third party agency issues a check that rectifies the issue
   - Yes – setup a holding account
   - No – no, do not setup a holding account
5. GL Accounting Code – enter the general ledger accounting code for the third party
6. Student GL Code – enter the general ledger accounting code for the sponsored student
7. Address, City, State, Zip – enter the contact address detail for the third party
8. Contact Information – enter the contact name, phone, and email for the third party
9. Exceeds Allowed Disclaimer – enter a message that will be displayed if room assignment exceeds the amount allowed for the third party
10. Invalid Contract Disclaimer – enter a message that will be displayed when the contract is no longer valid for the student with the third party
11. Billing Functions
    - Custom Billing
      - Yes – the billing for the sponsor is custom billing
      - No – if no is selected, sponsor and parent payments should be entered on each student's program/room assignment after the family has been split
      - Template – the third party billing template is being used to handle billing
12. Billing Type – (hidden if Custom Billing is Template)
    - Dollar – billing is completed using dollars on rate
    - Percentage – billing is completed using percentage of rate

    - Rate Based
13. Billing On
    - On Schedule – third party reimbursement is calculated using the student's schedule regardless of actual attendance
    - On Attendance – third party reimbursement is calculated using the student's attendance regardless of the student's schedule
    - Combined – third party reimbursement is calculated using the student's schedule or attendance, whichever is greater
    - On Attendance if Scheduled using Attended Rate – calculated using the student's attendance if the student is scheduled for the day using the attended rate
    - On Attendance if Scheduled using Scheduled Rate – calculated using the student's attendance if the student is scheduled for the day using the scheduled rate
14. Allow Flexible Schedule
    - Yes
    - No
15. Allow Program Calendar
    - Yes
    - No
16. On Attendance do Prebill On Schedule
    - Yes- the system will bill copay based on schedule
    - No - the system will not bill copay based on schedule, and will only bill based on attendance
17. Process Order- this will impact if a child has multiple third party sponsors/contracts
    - Default order – no order is required
    - Always first – process bulling for the third party first
    - Always last – process billing for the third party last
18. Allow Discounts
    - No – discounts are not allowed to be applied to students with the third party

    association
  - Yes – discounts are allowed to be applied to students with the third party association

19. Configuration
    - Rate Type
        - Uses Student's Third Party Reimbursement Rate – the billing will use the third party reimbursement rate entered on the student’s third party screen
        - Uses Rate Table – third party agency has a rate table for all students within an age range
            - The rate table must be set up at the business level if all rates are consistent for all users of the third party agency IR set up at the center level if the rates are unique at the center level
    - Uses Set Reimbursement Amount – reimbursement mount is the same for all associated with agency
20. Billing Unit
    - Daily
    - Hourly
    - Daily based on Hourly
21. Billing Unit Rounding
    - Half Hour
    - Hour
    - None
    - Custom
22. Round Increment
23. Round Up At
24. Stop Billing
    - Stop on withdrawal date – third party reimbursement, copay, and over market charges will stop on the withdraw date
    - Continue through invoice period – third party reimbursement, copay, and over market charges will bill throughout the invoice period which the withdraw date is included

25. Allow Copay
    - Yes – copay reimbursement will be set up on the student's third party screen
    - No – copay reimbursement is not allowed by third party agency
    - System calculated – difference between third party rate and the reimbursement amount
    - Yes – on unit
26. If Monthly Reimbursement Convert To Weekly
    - Yes – monthly reimbursement rate is divided by 4.333
    - No - monthly reimbursement rate to be used
27. Bill Copay On
    - Default
    - Attendance
    - Schedule
    - Schedule Not Scheduled Day Off
28. Copay Coverage (Not seen if "Allow Copay is No)
    - Child – copay is by child
    - Family – copay is by family
29. Copay Frequency
    - Same as Copay Reimbursement Type – the copay frequency equals copay reimbursement type selected on the child's third party setup screen
    - Matches Agency Billing Period – the copay frequency equals the agency billing period setup
30. Copay Conversion
    - None – copay entered on student setup is used
    - Daily – copay amount entered on child setup is divided by the billable days according to copay type selected on student screen
        - If selected, remove hourly, percentage, and semi-monthly from child set up copay type drop-down
    - Weekly
    - Biweekly – Copay amount entered on child setup is divided by 2 and used in each of the first two billing cycles (uses agency billing setup to determine

    correct billing cycles)
        - If selected, remove hourly, weekly, percentage and semi-monthly from child setup copay type drop-down
    - Custom – copay will be converted using indicator on agency billing setup

31. Deduct Copay from Reimbursement Rate
    - Yes – the copay reimbursement rate is deducted from the third party agency reimbursement rate
    - No - the copay reimbursement rate is not deducted from the third party agency reimbursement rate
32. Maximum Billable Amount
    - Yes – a maximum billable is used in the billing configuration
    - No - no maximum billable is used in the billing configuration
33. Display Additional Maximum Amount
    - Yes
    - No
34. Charge Over-Market Tuition Difference to Parent
    - Yes – the third party agency contract states that over market charges are allowed
    - No - the third party agency contract states that no additional tuition charges outside of copay may be charged
35. Split Attendance
    - Yes
    - No
36. Paid Holidays
    - Yes – the third party agency will reimburse the client for client holidays
    - No – the third party agency will not reimburse the client for client holidays
37. Paid Absence Days
    - Yes – the third party agency will reimburse the client for student absence days
    - No – the third party agency will not reimburse the client for student absence days
38. Annual Registration Fees Allowed to Parent

   - Yes – the third party contract states that registration fee can be charged to parent
   - No – the third party contract states that registration fee cannot be charged to parent

39. Sponsor Amount
   - Dollar
   - Percentage
40. Require Private Pay Discounts
   - Yes – the third party agency contract requires that enrollment discounts must be applied to tuition for students associated to third party agency
   - No – enrollment discount is not to be given to students associated to third party agency
41. Reservation Fees (only displayed if Yes is selected for Require Private Pay Discounts
   - No – reservation fees are not applied
   - Over Market Only – reservation fees are on Over-Market amount only
   - Copay and Over Market – reservation fees are on copay and over-market amounts
   - Copay Only
42. Allow Late Payment Fee
   - Yes – third party agency allows late payment fee to be charged to parent
   - No – third party agency does not allow late payment fees to be charged to parent
43. Allow Late Pickup Fee
   - Yes – third party agency allows late pick up fee to be charged to parent (default)
   - No – third party does not allow late pick up fees to be charged to parent
44. Activity Fee
   - Parent Pays – activity fees are paid by parent. Activity fee schedule not available to be attached to student contract
   - No One Pays – activity fee schedule not available to be attached to student

    contract
  - Third Party Pays – activity fees are paid by agency. Activity fee schedule available to be attached to student contract

45. Over Market Discount Type
    - N/A
    - Disc Discount
46. Multi Day Max Unit
    - No
    - Yes – allow multiple max day units for a student's third party contact
    - Yes - Category
47. Multi Day Max Unit - Total Max On Contract
    - Yes – allow maximum number of days to be selected on a student's third party contract
    - No
48. Multi Day - Allow Number of Units Authorized
    - Yes
    - No
49. Multi Day Max Unit - Calculate Unit Substitution
    - Yes
    - no
50. Display Special Rate
    - Yes – display special rate for a third party agency
    - No – do not display special rate for third party agency
51. Display Restricted Hours
    - Yes – display restricted hours for a third party student
    - No – no, do not display restricted hours
52. Allow Multi Manual Charge
    - Yes
    - No
53. Require Child Contract ID
    - Yes
    - No

54. Require Child Case Number
    - Yes
    - No
55. Data Collection
    - Submission of Invoice after close of Invoice Period within X Days – enter the number of days after the invoice period closes that the invoice must be at third party agency
    - Submission of Rebilling Invoice within _____ Days of receipt of original payment – enter the number of days rebilling must be submitted after original payment is received
    - One Check per Invoice
        - Yes – payment received is for one invoice period
        - No – payment received may include multiple invoice periods
56. One Check per Child
    - Yes – payment received is for one student
    - No – payment received may include multiple students and multiple invoice periods
57. Check Delivery
    - Support Central – payment is received at Support Central
    - School – payment is received at center
58. Allocation Sheet Delivery
    - Support Central – allocation sheet is received at Support Central
    - School – allocation sheet is received at center
59. Over Payment Action
    - Refund – if an overpayment is received, the third party agency wants a refund processed
    - Deduction – if an overpayment is received, the third party agency will deduct from the next payment
60. Labels – this section determines what labels will be displayed when setting up a third party contract for a student
    - Contract Unit

    - Contract Unit 2
    - Copay
    - Copay 2
    - Coverage – enter coverage type
    - Maximum Units
    - Maximum Units 2

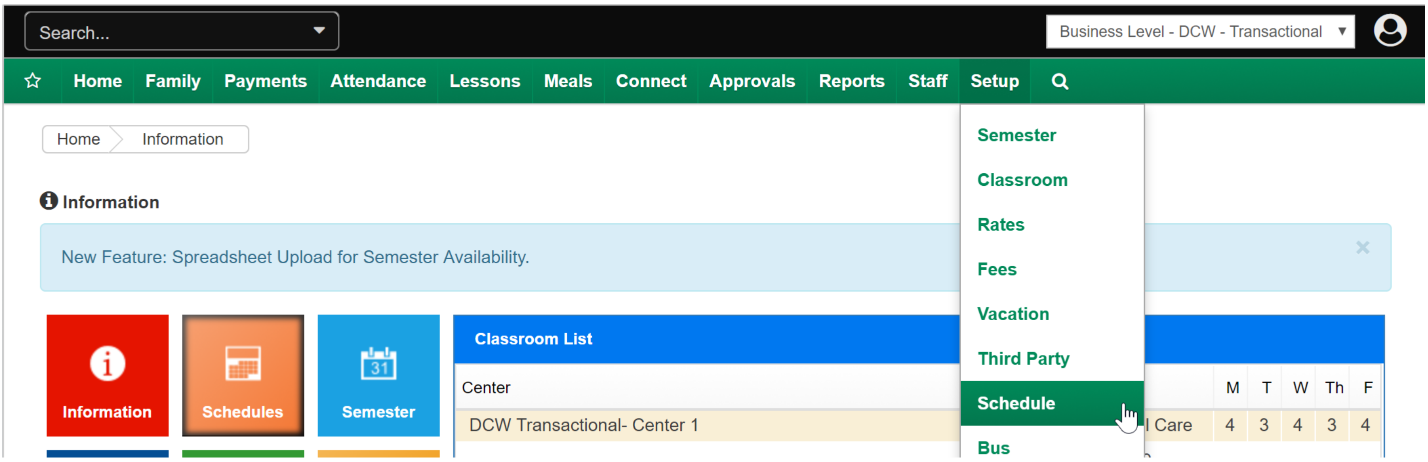
61. Click Save

Setup > Schedule

Last Modified on 10/12/2017 8:04 pm EDT

Adding a center schedule allows you the ability to add holidays to your center's operating schedule. These schedules display when a center is open or closed or when a family will be charged for a day the center is closed. If **No Payment** is selected as a day for the schedule, children will not be billed for the day. If a child is assigned a flat rate, the child will still be charged for the day if **No Payment** is selected as a day for the schedule.

Click on the Setup tab then select the Schedule option.



Enter the date the schedule will take place on in the Item Date text box.

Then enter the name of the schedule event in the Description text box.

Select the scheduled activity for the day in the Action drop down list.

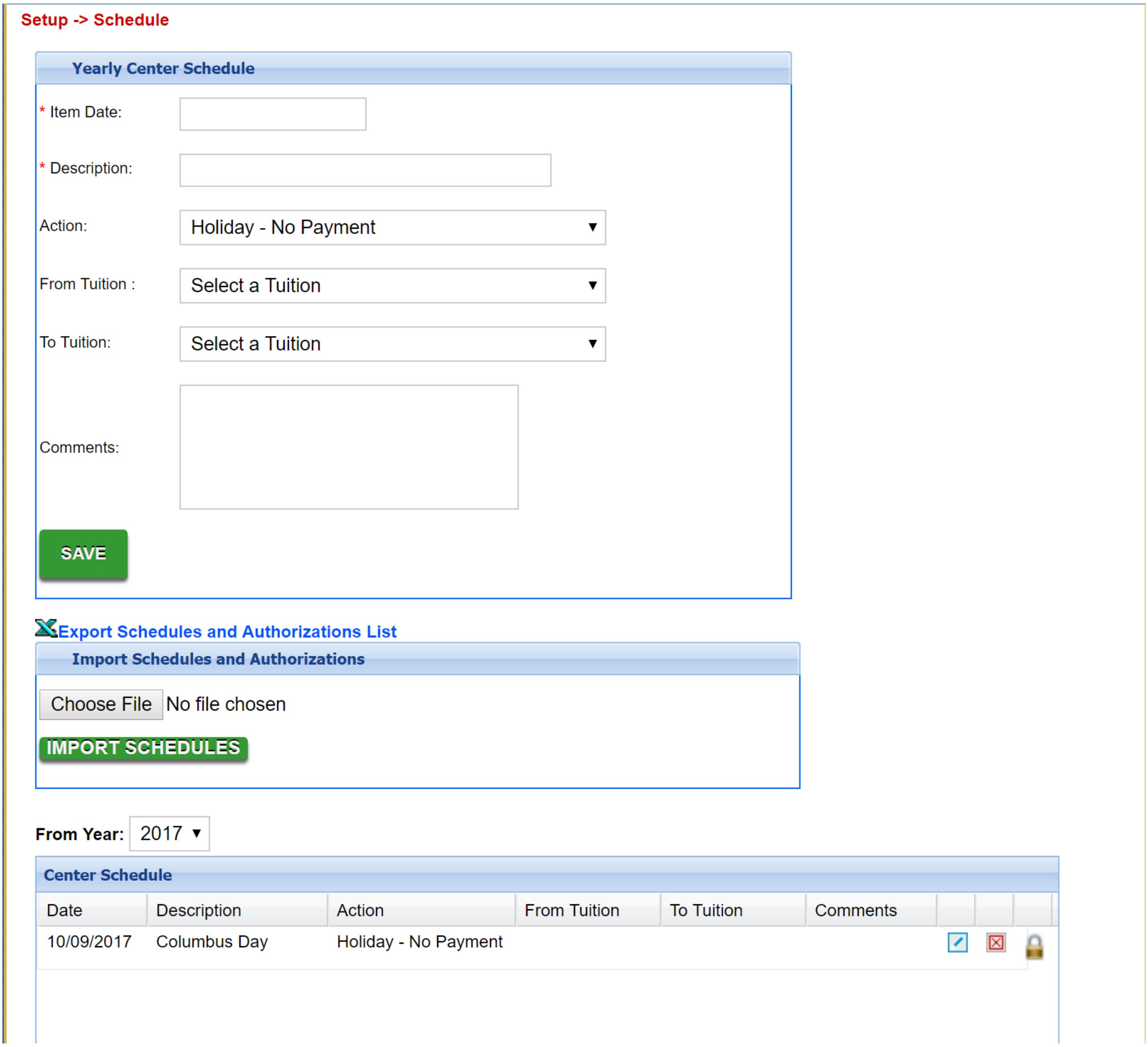
- Select Holiday – No Payment if the center will be closed due to a holiday. Children with an assigned schedule for the day will not be charged for attendance on the day.
- Select Holiday – Payment if the center will be closed due to a holiday. Children with an assigned schedule for the day will still be charged for attendance on the day.
- Select Emergency Close – No Payment if the center will be closed due to an emergency. Children with an assigned schedule for the day will not be charged for attendance on the day.

- Select Emergency Close – Payment if the center will be closed due to an emergency. Children with an assigned schedule for the day will still be charged for attendance on the day.
- Select Change Tuition if the center will still be open for the day but children will be changed from one tuition rate to another for only the day. After that date, the children will return to their previous rate. This allows administrators the ability to close a center for a half day and only charge children a half-day rate.
- Select Academic Year Start to setup the date a center wide registration will start. The center wide registration must be setup for this date to function.

If Change Tuition was selected in the Action drop down list, select the rate the children will be coming from in the From Tuition drop down list and then select the new rate for the children for the day in the To Tuition drop down list.

Then, enter any additional information for the schedule in the Comments text box.

When finished, click on the Save button.



Setup -> Schedule

Yearly Center Schedule

* Item Date:

* Description:

Action: Holiday - No Payment ▾

From Tuition : Select a Tuition ▾

To Tuition: Select a Tuition ▾

Comments:

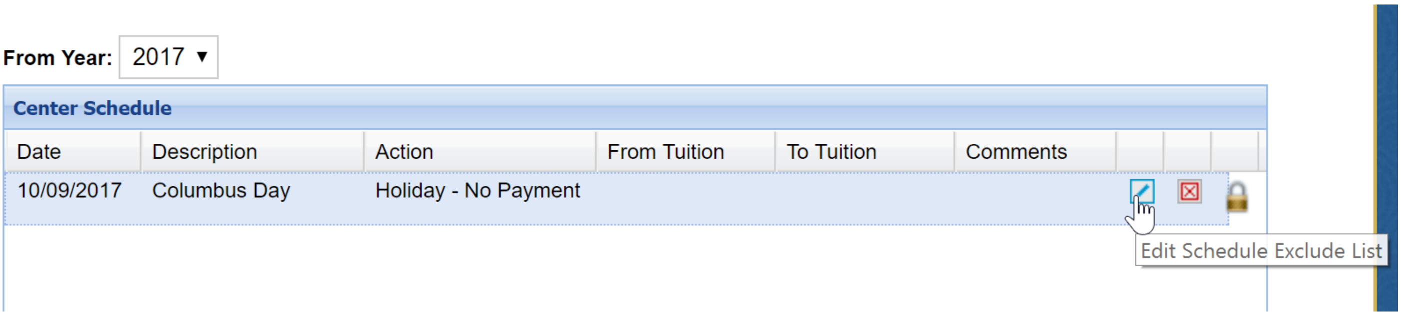
No file chosen

From Year: 2017 ▾

Center Schedule

Date	Description	Action	From Tuition	To Tuition	Comments
10/09/2017	Columbus Day	Holiday - No Payment			

If restrictions need to be added to the scheduled day select the green edit icon.

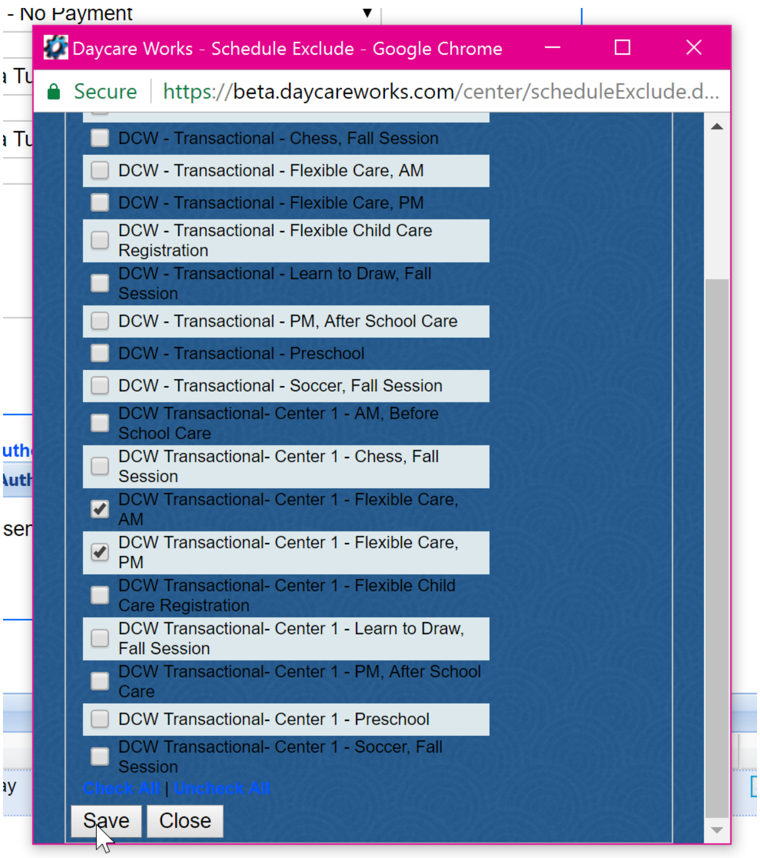


From Year: 2017 ▾

Center Schedule

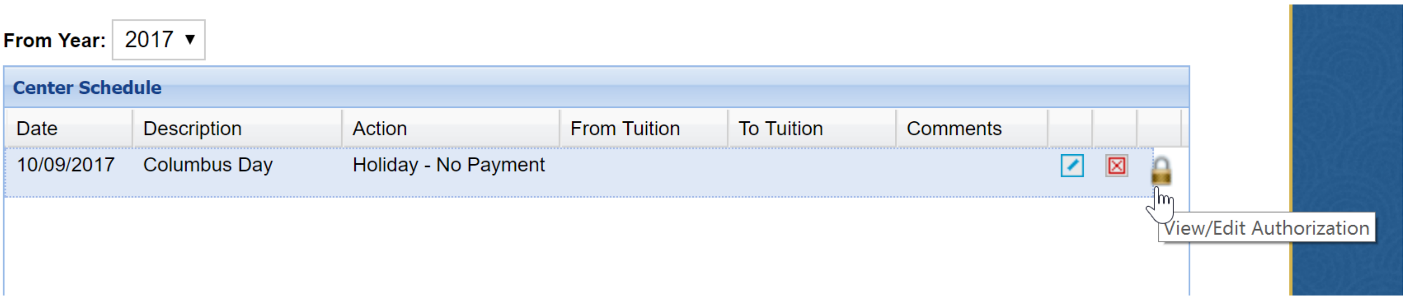
Date	Description	Action	From Tuition	To Tuition	Comments
10/09/2017	Columbus Day	Holiday - No Payment			

Select the room/programs the schedule day should apply to, then select Save.



☐ DCW - Transactional - Chess, Fall Session
☐ DCW - Transactional - Flexible Care, AM
☐ DCW - Transactional - Flexible Care, PM
☐ DCW - Transactional - Flexible Child Care Registration
☐ DCW - Transactional - Learn to Draw, Fall Session
☐ DCW - Transactional - PM, After School Care
☐ DCW - Transactional - Preschool
☐ DCW - Transactional - Soccer, Fall Session
☐ DCW Transactional- Center 1 - AM, Before School Care
☐ DCW Transactional- Center 1 - Chess, Fall Session
☑ DCW Transactional- Center 1 - Flexible Care, AM
☑ DCW Transactional- Center 1 - Flexible Care, PM
☐ DCW Transactional- Center 1 - Flexible Child Care Registration
☐ DCW Transactional- Center 1 - Learn to Draw, Fall Session
☐ DCW Transactional- Center 1 - PM, After School Care
☐ DCW Transactional- Center 1 - Preschool
☐ DCW Transactional- Center 1 - Soccer, Fall Session

Select the View/Edit Authorization icon to allow at specific centers or states.

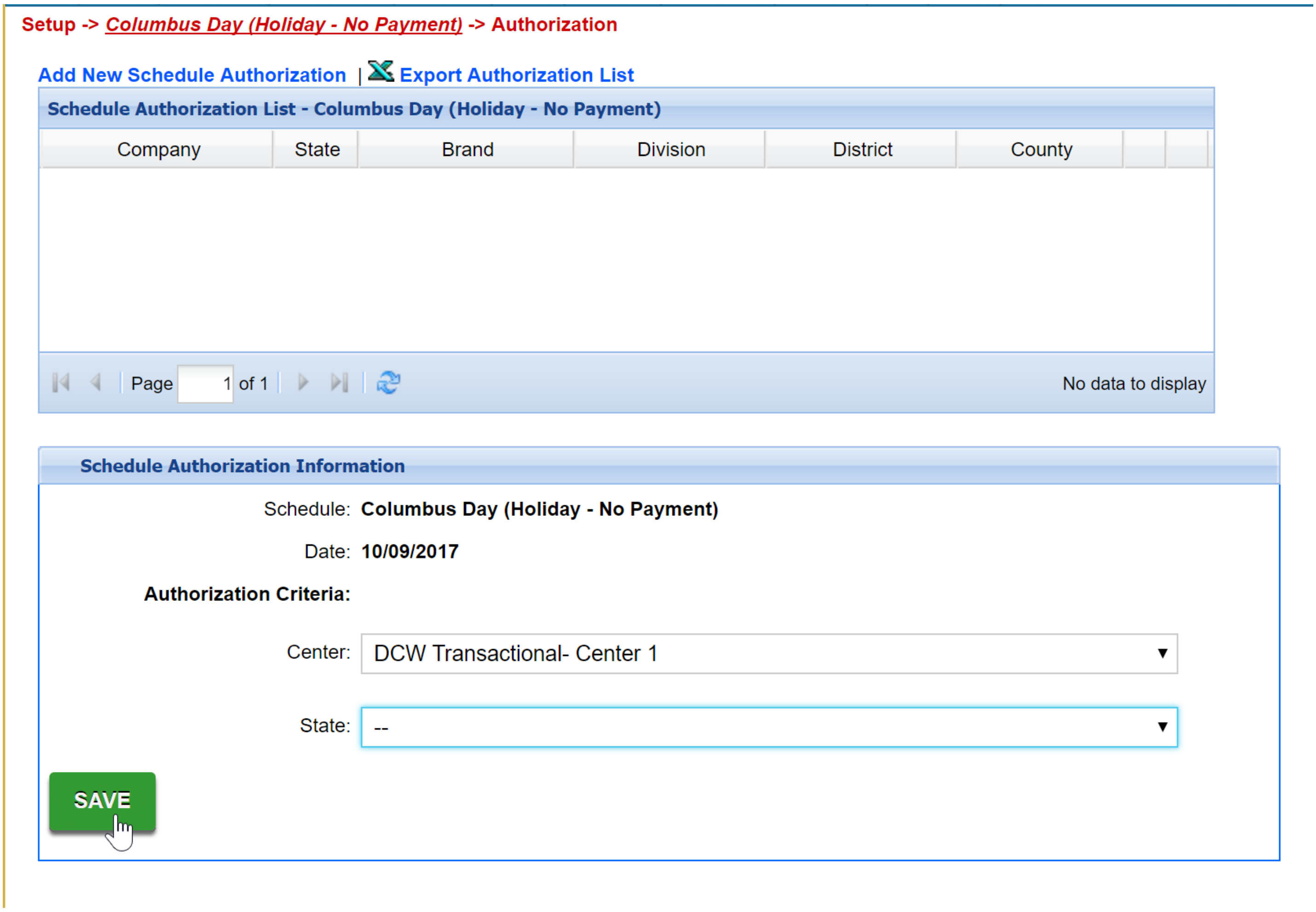


From Year: 2017

Center Schedule

Date	Description	Action	From Tuition	To Tuition	Comments
10/09/2017	Columbus Day	Holiday - No Payment			

Select the center and/or state, then select Save.


Setup -> Columbus Day (Holiday - No Payment) -> Authorization

Schedule Authorization List - Columbus Day (Holiday - No Payment)

Company	State	Brand	Division	District	County

No data to display

Schedule Authorization Information

Schedule: Columbus Day (Holiday - No Payment)

Date: 10/09/2017

Authorization Criteria:

Center: DCW Transactional- Center 1

State: --

The scheduled day will only apply to the selected programs, centers and states.

Setup > Bus

Last Modified on 12/04/2018 12:31 pm EST

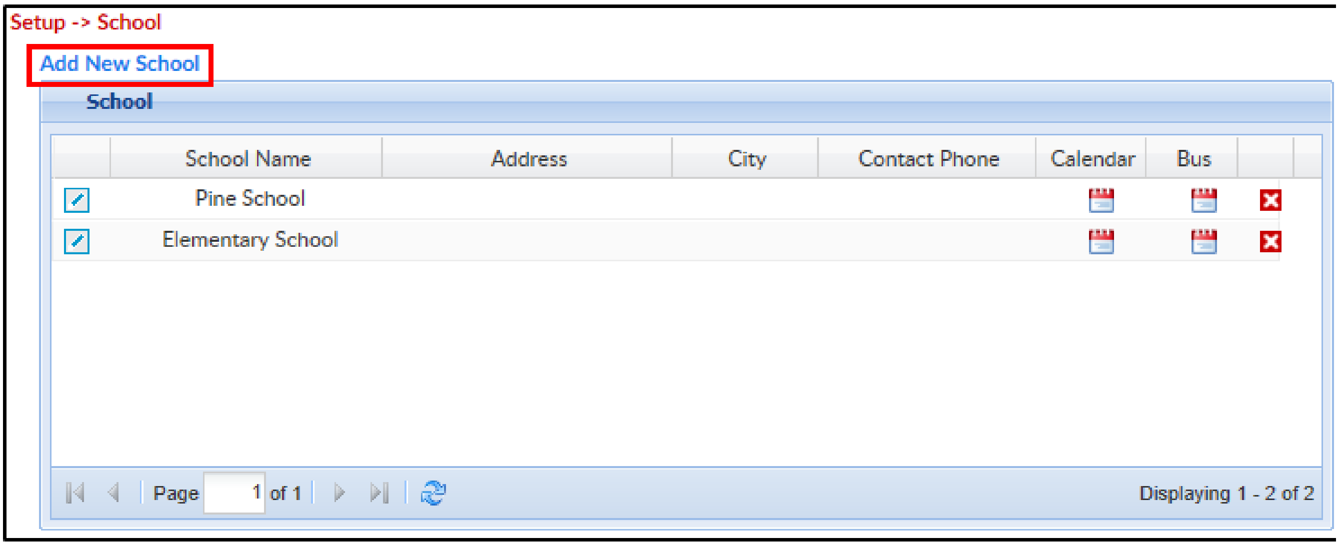
Centers can setup bus run schedules to other centers or locations for pickup or drop-off service. Setting up bus run schedules allows students to be associated to buses and appear on bus rosters.

Key Point: Bus schedules are setup at a center level and not at the business level. Bus setup at the business level will not apply to centers underneath. Schools must be setup and **Yes** must be selected in the **Year-Round Schedule** to allow collapsible billing to function in the system.

Setup Bus Routes

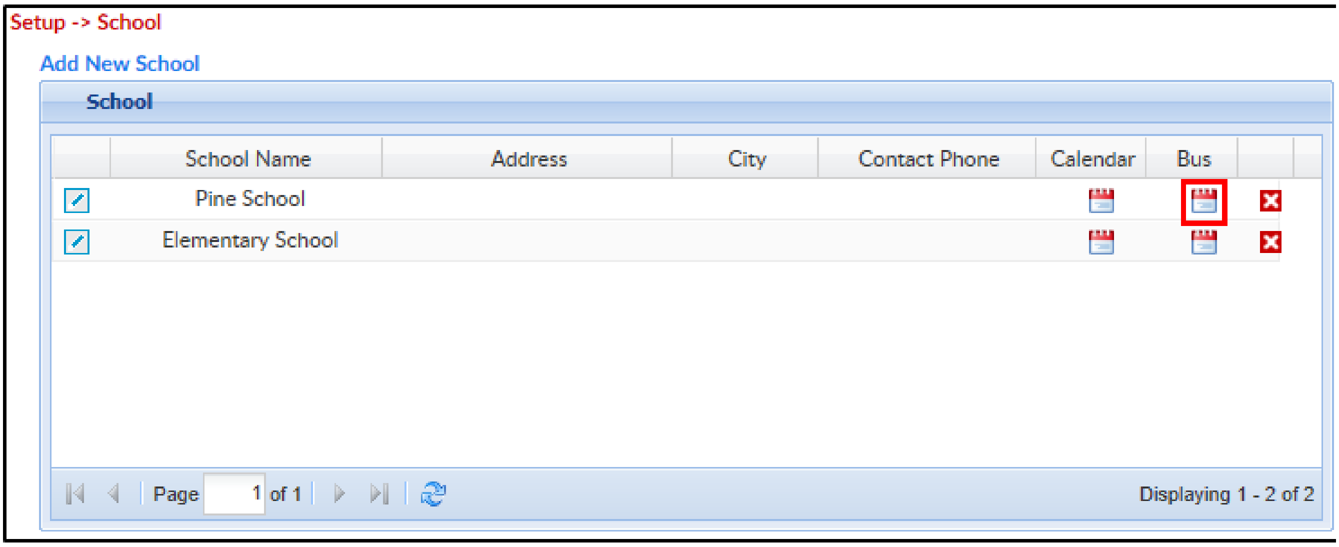
To setup a new bus route, follow the steps below:

1. From the Setup>Bus screen, click Add New School



	School Name	Address	City	Contact Phone	Calendar	Bus	
	Pine School						
	Elementary School						

2. Scroll down and complete the form
    - School name – enter the name of the school the bus originated from
    - Year-round schedule – select yes if using collapsible billing
    - Half day kindergarten
    - Address
    - Contact name/phone
    - Notes
3. Click Submit
4. Click the Edit icon under the Bus column for the correct school



Setup -> School

Add New School

School

	School Name	Address	City	Contact Phone	Calendar	Bus	
	Pine School						
	Elementary School						

Page 1 of 1 Displaying 1 - 2 of 2

5. Complete the Edit/Save Schedule form
    - Select Type
        - Pickup at School
        - Drop Off to School
6. Include in Roster
    - Yes
    - No
7. Half Day Kindergarten Indicator
    - Yes
    - No
8. Enter a Start Date
9. Enter an End Date if applicable, leave blank if no end date is needed
10. Select the days of the week
11. Enter the Expected Departure time
12. Enter the Expected Arrival time
13. Click Save to create the schedule
    - Please note: Each date is created on a new line, see below

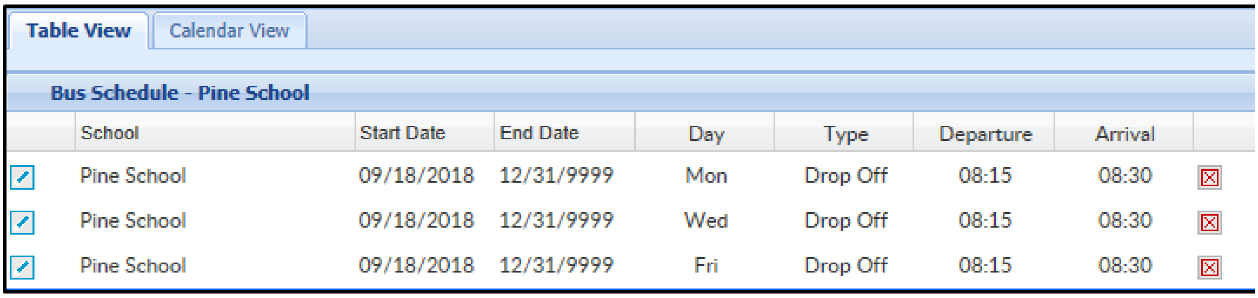


Table View | Calendar View

Bus Schedule - Pine School

	School	Start Date	End Date	Day	Type	Departure	Arrival	
	Pine School	09/18/2018	12/31/9999	Mon	Drop Off	08:15	08:30	
	Pine School	09/18/2018	12/31/9999	Wed	Drop Off	08:15	08:30	
	Pine School	09/18/2018	12/31/9999	Fri	Drop Off	08:15	08:30	

Setup > Health

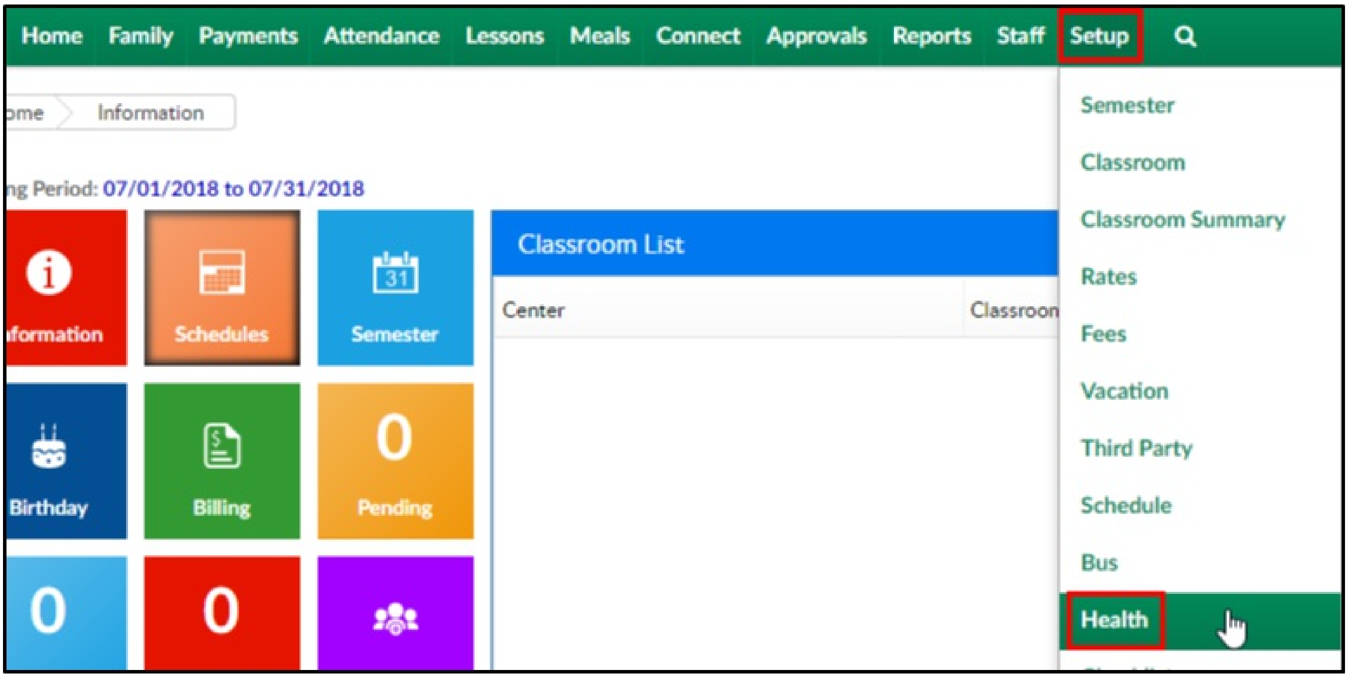
Last Modified on 12/04/2018 11:10 am EST

Health alerts in the system helps centers manage the immunization schedule for students in the center. These health alerts will notify administrators if a student's immunizations are about to or have already expired in the system.

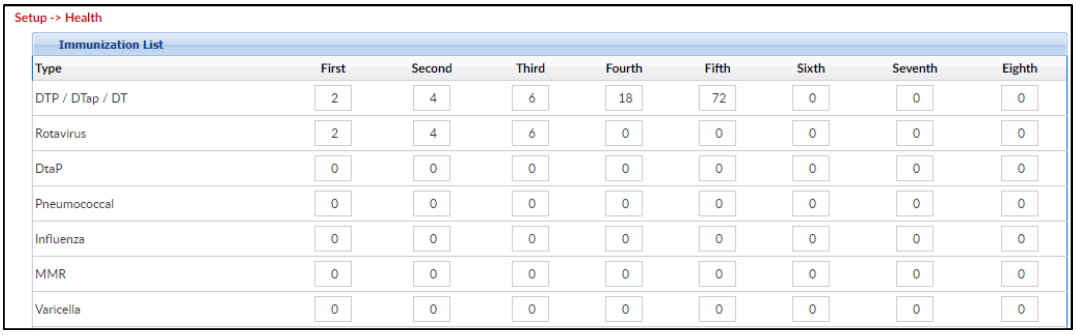
Health Alerts can be viewed by navigating to Home>Alerts and choose Child Alerts in the search criteria section.

---

1. Click Setup, then select Health



2. In each of the required immunization rows, enter the age of the student (in months) when they are required to receive each dose. Examples:
    - Students should receive 5 doses of DTP/DTap/DT. 2 months, 4 months, 6 months, 15-18 months, and 4-6 years old
    - Rotavirus is given in 3 three doses; 2 months, 4 months, and 6 months



Setup -> Health

Immunization List

Type	First	Second	Third	Fourth	Fifth	Sixth	Seventh	Eighth
DTP / DTap / DT	2	4	6	18	72	0	0	0
Rotavirus	2	4	6	0	0	0	0	0
DtaP	0	0	0	0	0	0	0	0
Pneumococcal	0	0	0	0	0	0	0	0
Influenza	0	0	0	0	0	0	0	0
MMR	0	0	0	0	0	0	0	0
Varicella	0	0	0	0	0	0	0	0

3. When all immunizations are entered, click Save

Setup >Checklist

Last Modified on 10/12/2017 8:18 pm EDT

Administrators can setup checklists for other administrator roles in the system. These checklists are step by step processes for tasks that administrators must complete within the system. Checklists can be scheduled to run on a daily, weekly, monthly or billing cycle basis. Before administrators can assign checklists to administrators, checklists must be setup in the system.

Click on the Setup tab on the main toolbar.

Enter the title of the checklist in the Name text box.

Select the role of the administrator that will view the checklist in the Role drop down list. These roles are setup and assigned in the Admin tab.

Select Y in the Apply To All drop down list to apply the checklist to every administrator at the level.

If at the business level, select Y in the Apply To All Site drop down list to apply the checklist to every administrator and every site.

Select Approved in the Status drop down list to activate the checklist.

Select how often the checklist must be completed in the Frequency drop down list.

Enter the date the checklist will begin and end in the Starts and Ends text boxes.

If there a specific time the checklist should be made available at, enter the time in the Time the checklist is available drop down list. This time is based off a 24 hour clock.

When finished, click on the Save button.

After clicking on the Save button, the screen will refresh, indicating a successful save.

Click on the task icon for the checklist that was just created.

Enter the title of the task in the Name text box.

Then, select the activity for the task in the Activity drop down list.

If there is any additional information for the task, enter the information in the

Description text box.

When finished, click on the Save button.

After clicking on the Save button, the screen will refresh, indicating a successful save. Add additional tasks to the checklist following the same process.

When finished, click on the name of the checklist in the breadcrumb section.

Next, click on the Create User Tasks link. Clicking on the link is only required if the task is going to be displayed for today, the task will automatically process for later days.

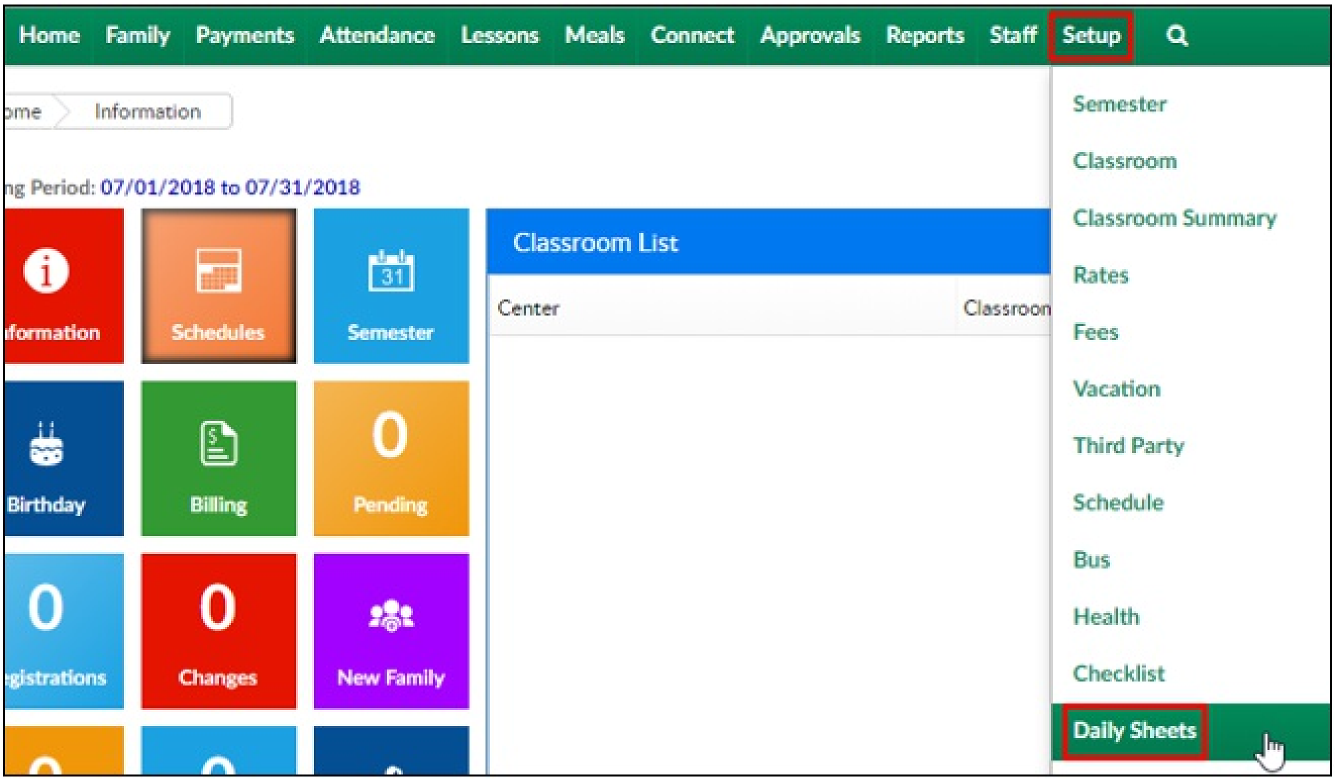
Setup > Daily Sheets

Last Modified on 12/04/2018 1:28 pm EST

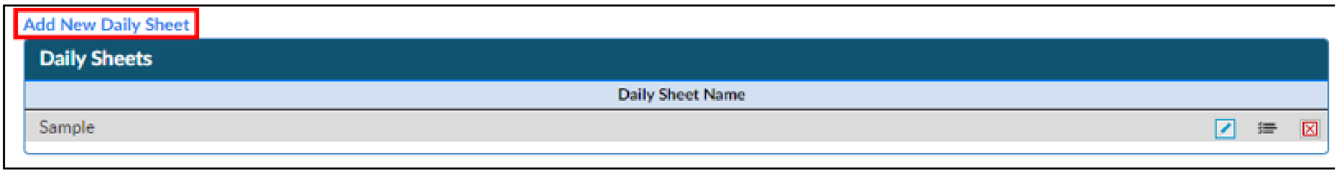
Setting up daily sheets allows centers the ability to keep families informed and up to date on what their students are doing within the center. Once daily sheets are set up, they must be associated to a category.

Creating Daily Sheets

1. Click Setup and select Daily Sheets



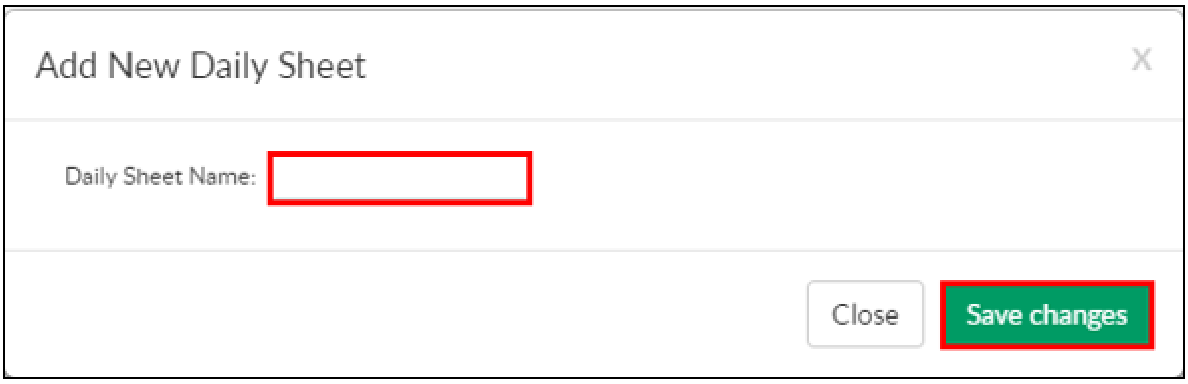
2. Daily Sheets can be viewed in the Daily Sheets section. Click Add New Daily Sheet



Daily Sheets

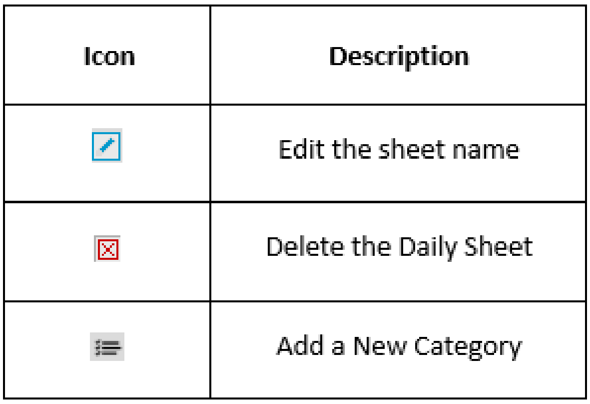
Daily Sheet Name
Sample

3. Enter a name, click Save Changes



4. The new sheet will be added to the current list of Daily Sheets

Editing Daily Sheets



Icon	Description
✎	Edit the sheet name
☒	Delete the Daily Sheet
☰	Add a New Category

Add a New Category

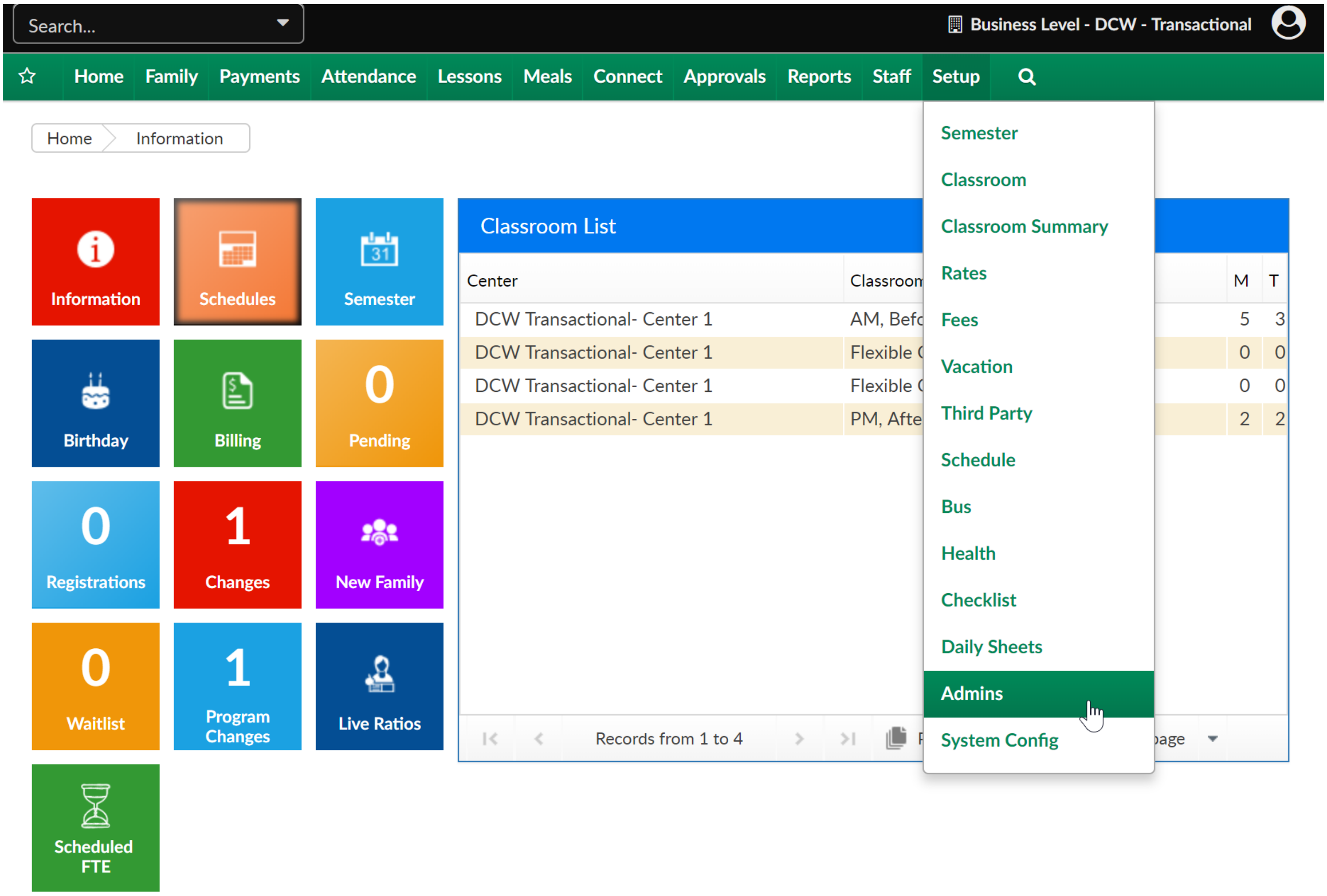
1. Click Add New Category
2. Complete the Add New Category popup
    - Enter a name of the category for the daily sheet
    - Choose the Default Category from the drop-down list
        - None – if the category is not for attendance or meals, select none
        - Attendance – will show the student's attendance on the daily sheet
        - Meals – will show any meals served to the student on the daily sheet
3. Enter the sequence number. This will determine the order of the categories on the daily sheet
4. Enter the category Type Code ______
5. Enter a brief description of the category. This will be used to outline what the category will display on the daily sheet
6. Allow Additional Rows for Category?
    - Yes – additional rows can be added for more detail
    - No - only one row for additional details will be added
7. Allow Note for Category?
    - Yes – select this for the ability to add notes for the category
    - No – notes are not able to be posted to category
8. Click Save changes
    - Click Add New Attribute to add new activity

- Complete the Add New Attribute popup and click Save changes

Setup > Admin

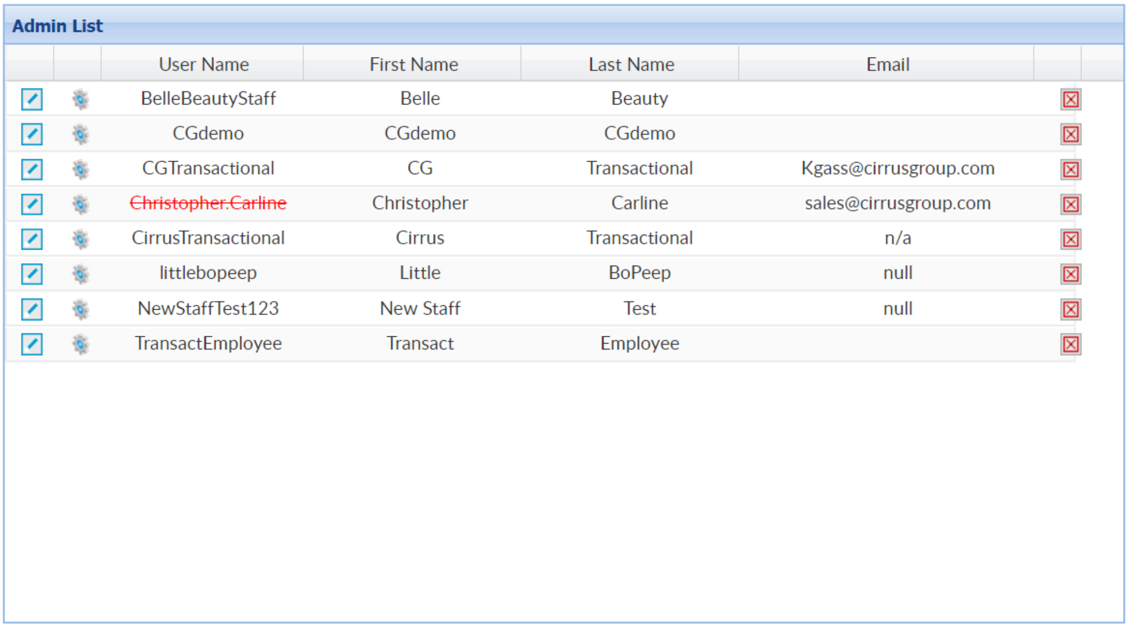
Last Modified on 05/23/2018 10:19 am EDT

From the Setup menu, select the Admins option.



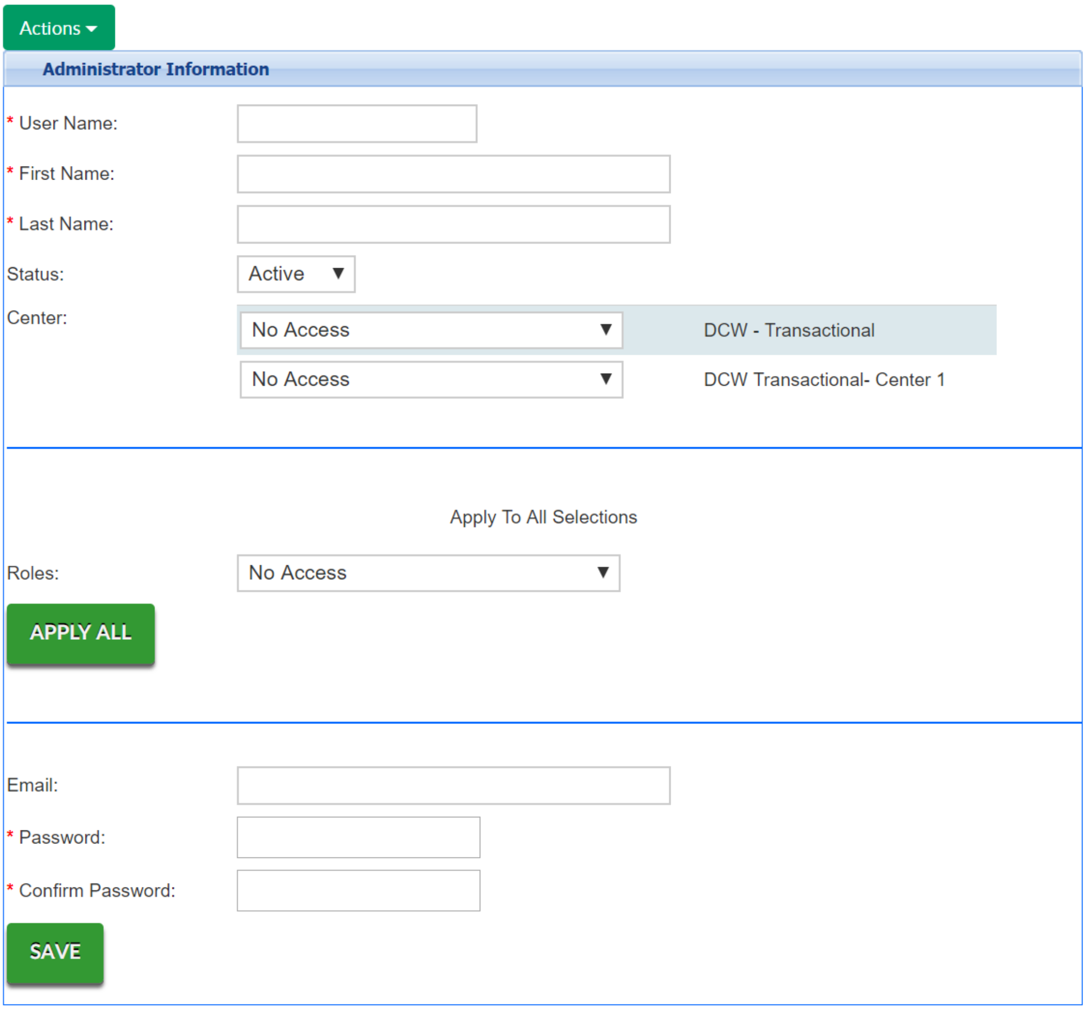
On the admins screen any user that has a username and password will display in the Admin List section. This means users setup under Staff > Staff List AND users setup directly from the Setup > Admins screen.

Setup -> Admins



Admin List

User Name	First Name	Last Name	Email
BelleBeautyStaff	Belle	Beauty	
CGdemo	CGdemo	CGdemo	
CGTransactional	CG	Transactional	Kgass@cirrusgroup.com
~~Christopher.Carline~~	Christopher	Carline	sales@cirrusgroup.com
CirrusTransactional	Cirrus	Transactional	n/a
littlebopeep	Little	BoPeep	null
NewStaffTest123	New Staff	Test	null
TransactEmployee	Transact	Employee	



Administrator Information

* User Name:

* First Name:

* Last Name:

Status: Active ▼

Center:

No Access ▼	DCW - Transactional
No Access ▼	DCW Transactional- Center 1

Apply To All Selections

Roles: No Access ▼

Email:

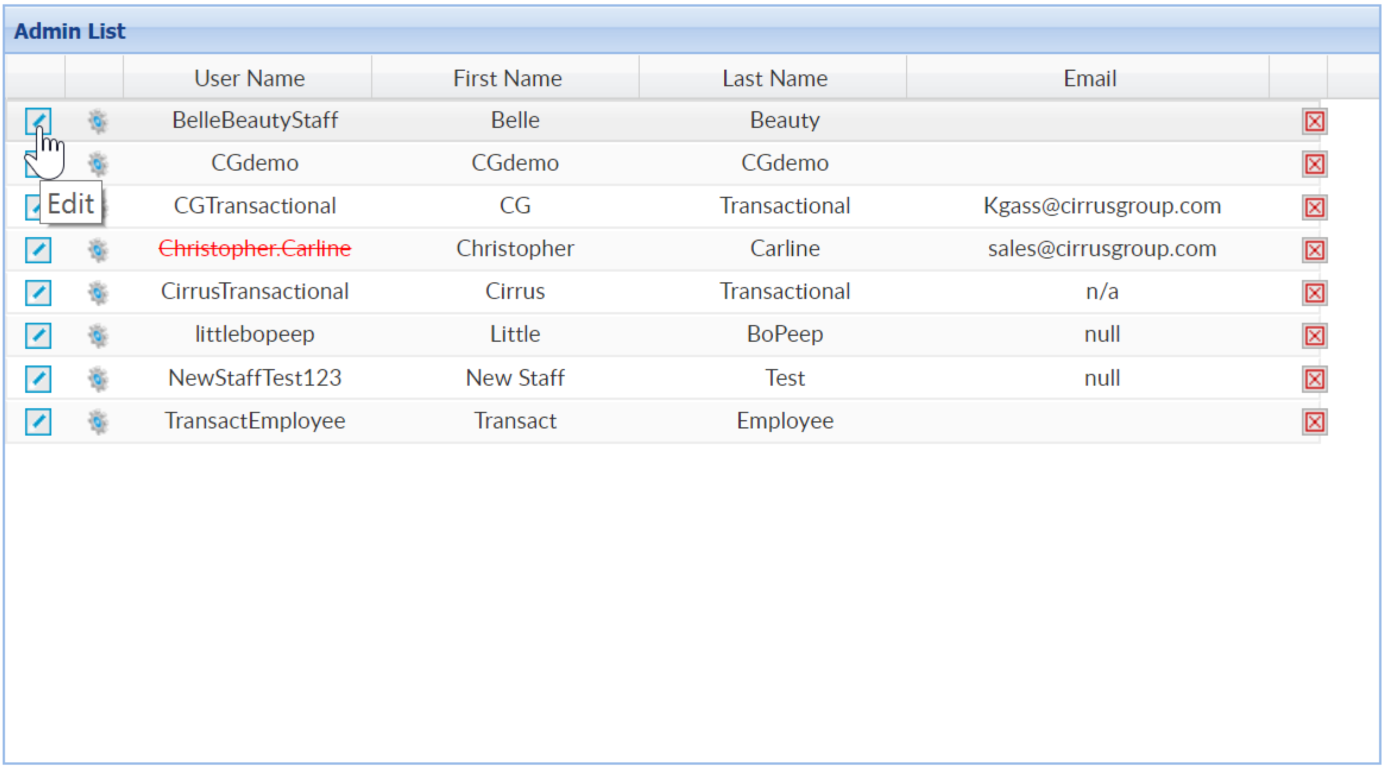
* Password:

* Confirm Password:

To edit a user's detail press the edit icon next to the user's username.

Note: Username cannot be edited once the name has been sent

Setup -> Admins



Admin List

		User Name	First Name	Last Name	Email	
		BelleBeautyStaff	Belle	Beauty		☒
		CGdemo	CGdemo	CGdemo		☒
		CGTransactional	CG	Transactional	Kgass@cirrusgroup.com	☒
		~~Christopher.Carline~~	Christopher	Carline	sales@cirrusgroup.com	☒
		CirrusTransactional	Cirrus	Transactional	n/a	☒
		littlebopeep	Little	BoPeep	null	☒
		NewStaffTest123	New Staff	Test	null	☒
		TransactEmployee	Transact	Employee		☒

Admins > Add New Administrator

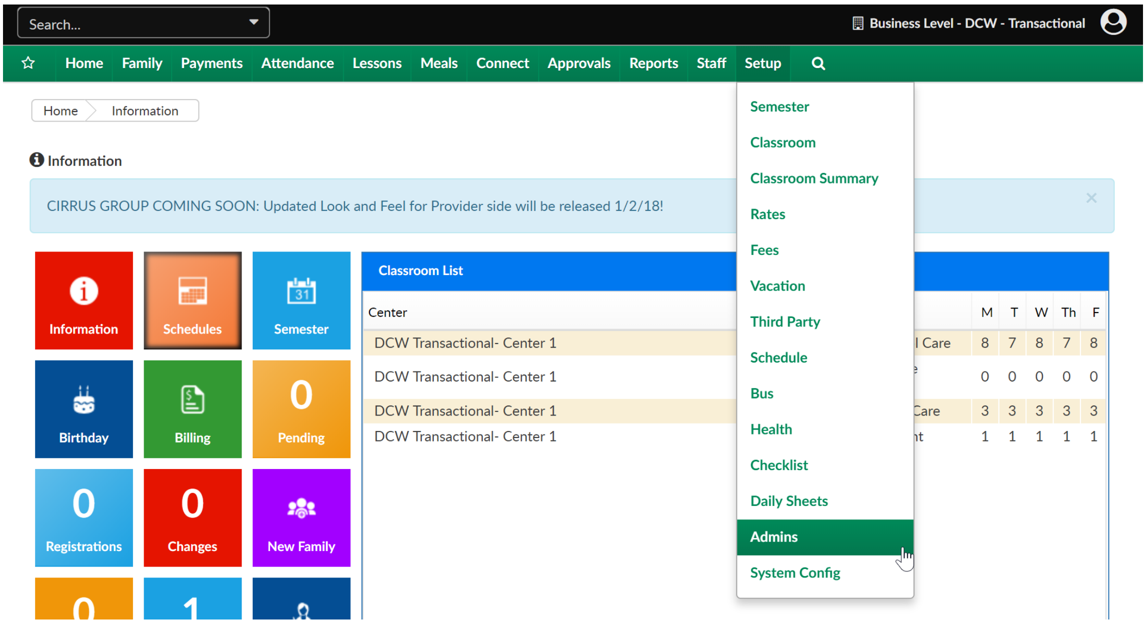
Last Modified on 12/26/2017 11:37 am EST

Administrators are users that can log into the the admin side of the system. Administrators can be assigned roles that restrict their access to activities and location access. Admins would login through either of the below links:

- SchoolCare Works- https://www.schoolcareworks.com/cg/secure_login.jsp
- DayCare Works- https://daycareworks.com/cg/secure_login.jsp

Note: A user should be added as an admin if they do not need to be counted towards a room's ratio. If the user will ever need to be part of a ratio the user should be added from the Staff > Staff List page. Once the user has been added on the staff page additional center access or role can be changed by navigating to the Setup > Admin page.

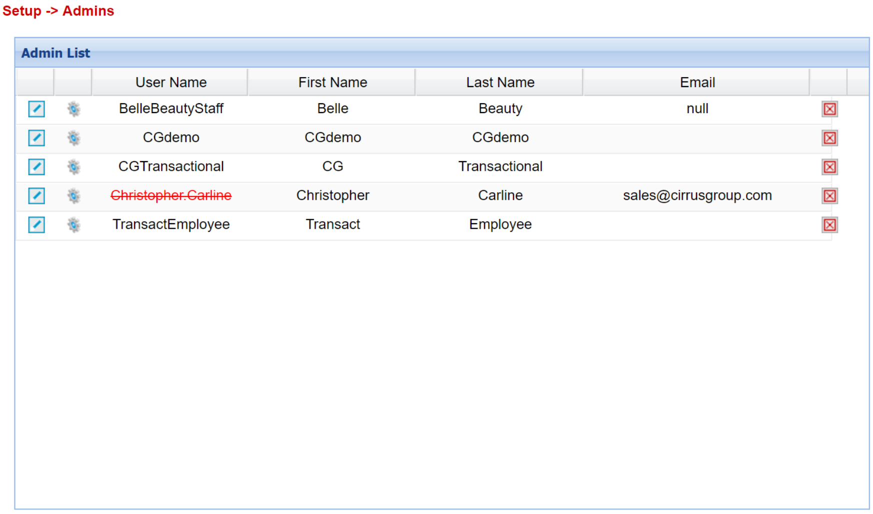
From the Setup menu, select the Admins option-



CIRRUS GROUP COMING SOON: Updated Look and Feel for Provider side will be released 1/2/18!

Center		M	T	W	Th	F
DCW Transactional- Center 1	l Care	8	7	8	7	8
DCW Transactional- Center 1	e	0	0	0	0	0
DCW Transactional- Center 1	Care	3	3	3	3	3
DCW Transactional- Center 1	nt	1	1	1	1	1

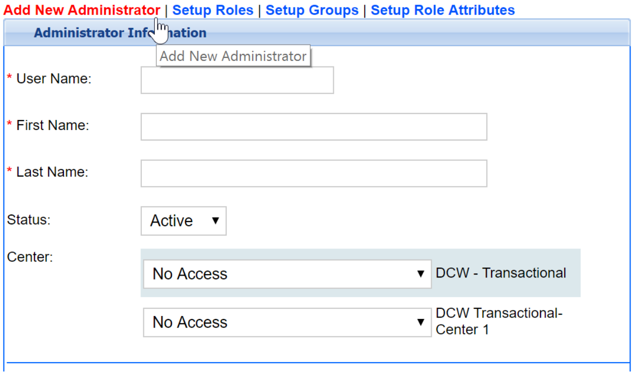
On the Admins page select the option to Add a New Administrator-



Setup -> Admins

Admin List

		User Name	First Name	Last Name	Email	
✎	⚙	BelleBeautyStaff	Belle	Beauty	null	☒
✎	⚙	CGdemo	CGdemo	CGdemo		☒
✎	⚙	CGTransactional	CG	Transactional		☒
✎	⚙	~~Christopher.Carline~~	Christopher	Carline	sales@cirrusgroup.com	☒
✎	⚙	TransactEmployee	Transact	Employee		☒



Add New Administrator | Setup Roles | Setup Groups | Setup Role Attributes

Administrator Information

* User Name:

* First Name:

* Last Name:

Status: Active ▾

Center:

No Access ▾ DCW - Transactional

No Access ▾ DCW Transactional-Center 1

In the Administrator Information section add the below detail, then press Save.

- Username- enter a unique username
- First Name- the user's first name
- Last Name- the user's last name
- Status- if the user is Active or Inactive
- Center- select the role the user will have at each center they should have access to (if a role is selected that hasn't been setup yet the user will not be able to login)
- Email- the user's email address
- Password- the user's password- the password must be 8 characters and include a number and special character (!@#$%^&*)
- Confirm Password- enter the same password as above

Continue this process until all users have been entered.

Setting Up or Editing Roles

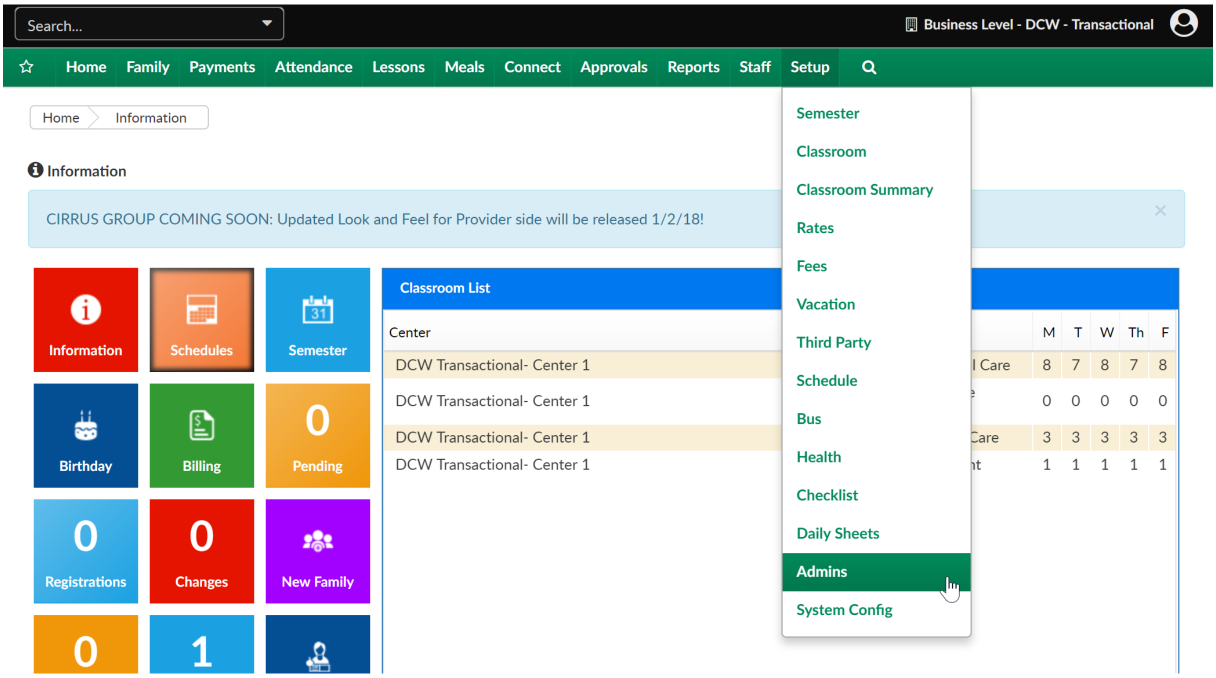
Last Modified on 05/18/2018 9:15 am EDT

Roles in the system allow groups of users to access different levels of information within the system. The process for setting up roles can be an on-going process as need may change.

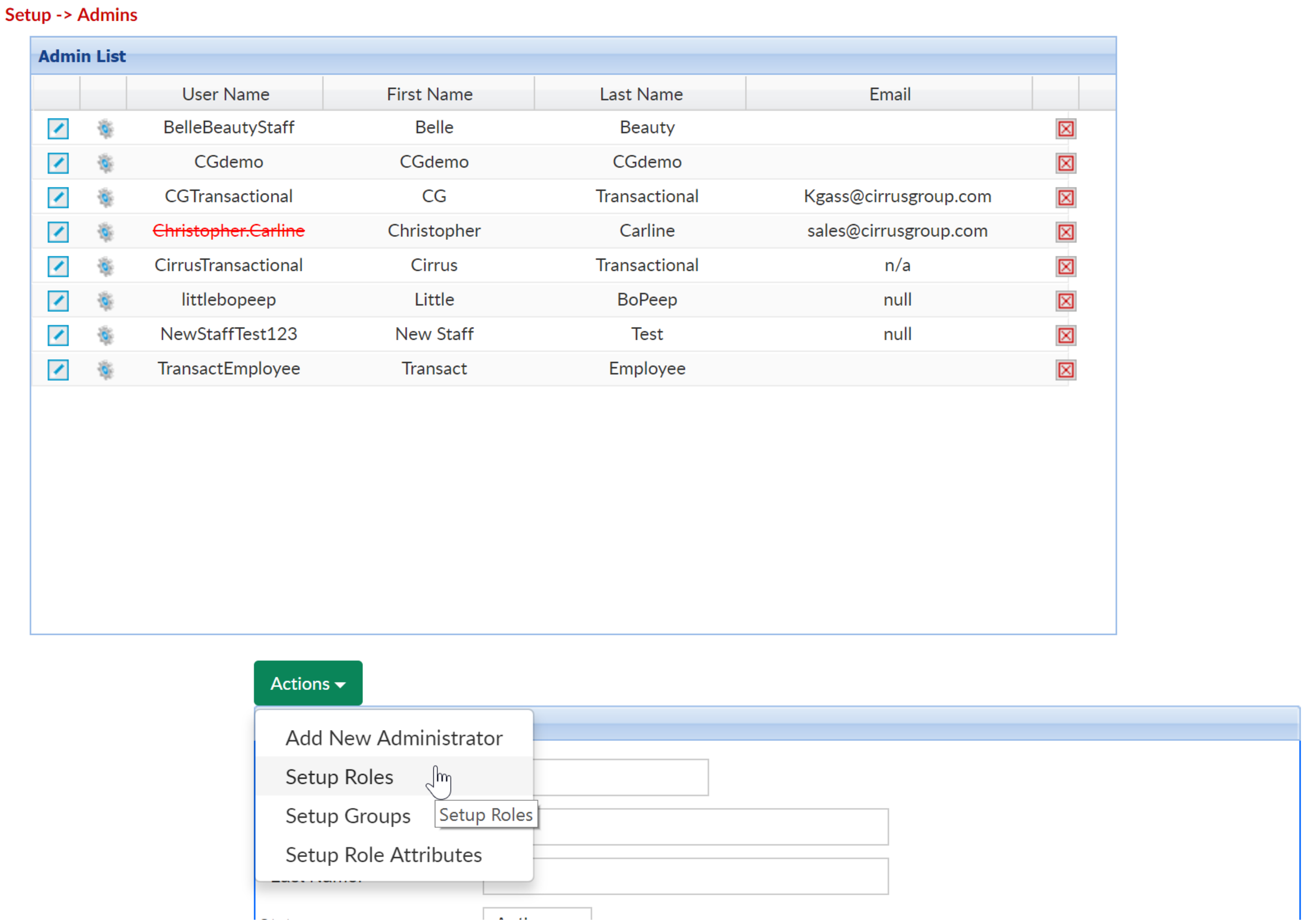
As a default the below roles are configured and can be used without having to setup roles.

- **Family Portal**: This only allows administrators the ability to search for students in the Platform and view the student's information.
- **Family Portal (Not Allowed)**: This role is only used for parents in the Connect Portal.
- **Site Administrator (Full Access)**: This role allows administrators the same ability as a Super User in the Platform; except administrators are not able to delete items in the Platform.
- **Site Administrator (No Financials)**: This role prevents administrators from being able to access the **Setup** tab, the **Payments** tab or the financial ledger for a family.
- **View Only (No Financials)**: This role prevents administrators from being able to access the **Setup** tab, the **Payments** tab or the financial ledger for a family. Administrators are only able to view information.
- **Super User**: This role allows administrators full access to everything in the Platform. *This is the highest role in the Platform*

From the Setup Menu, select Admins.

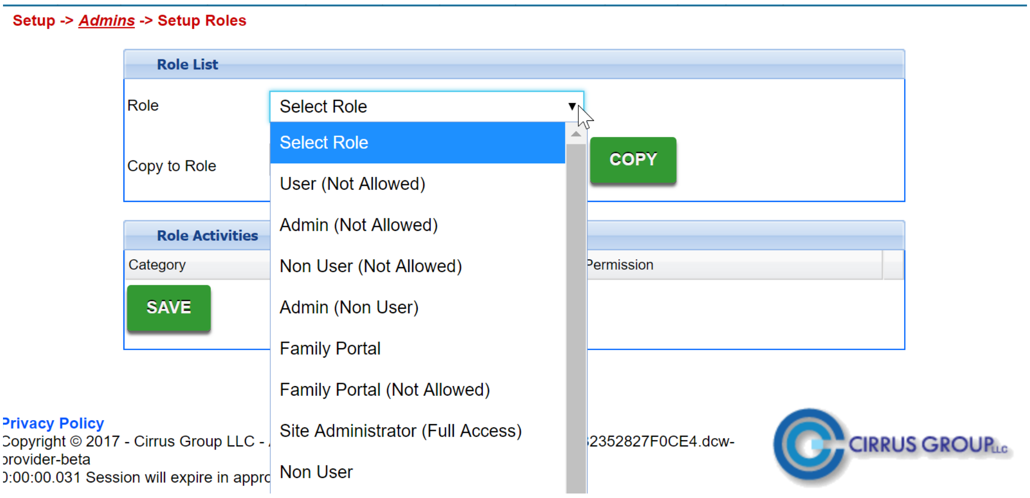


On the Admins page, select the option to Setup Roles-

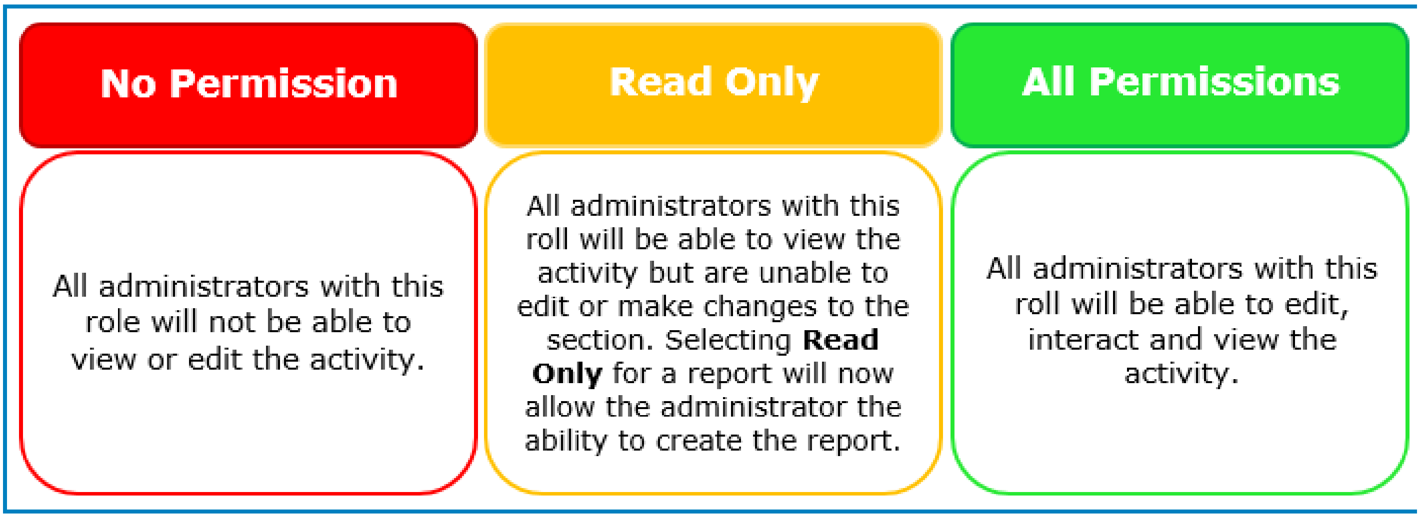


User Name	First Name	Last Name	Email
BelleBeautyStaff	Belle	Beauty	
CGdemo	CGdemo	CGdemo	
CGTransactional	CG	Transactional	Kgass@cirrusgroup.com
~~Christopher.Carline~~	Christopher	Carline	sales@cirrusgroup.com
CirrusTransactional	Cirrus	Transactional	n/a
littlebopeep	Little	BoPeep	null
NewStaffTest123	New Staff	Test	null
TransactEmployee	Transact	Employee	

On the Setup Roles page, select the role that will be configured-

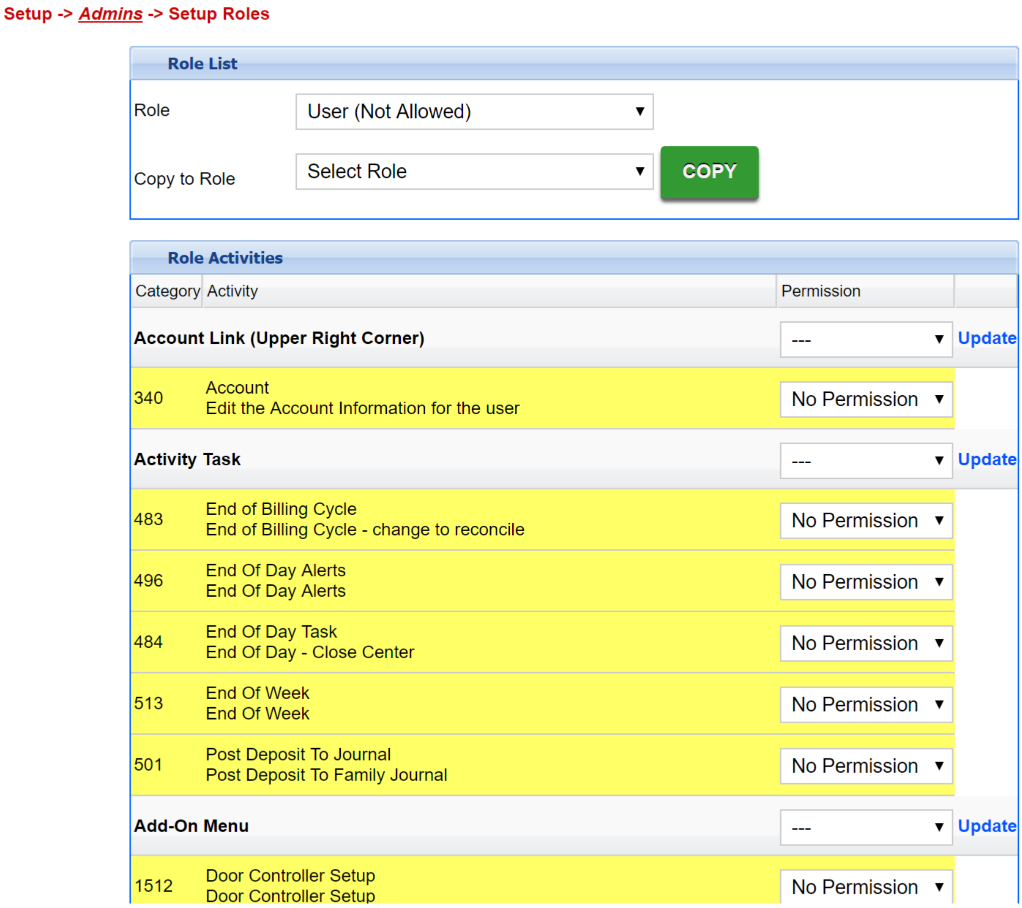


When the permissions pop up all of the lines will be yellow- this means the role has not been configured yet. As new features and permissions are added the lines of those permissions will be yellow meaning the option hasn't been set yet. For each permission decide if it should be set to-



No Permission	Read Only	All Permissions
All administrators with this role will not be able to view or edit the activity.	All administrators with this roll will be able to view the activity but are unable to edit or make changes to the section. Selecting **Read Only** for a report will now allow the administrator the ability to create the report.	All administrators with this roll will be able to edit, interact and view the activity.

- No Permission- will not be seen
- All Permissions- will be seen/used
- Read Only- will be view only (coming soon)


Setup -> *Admins* -> Setup Roles

Role List

Role: User (Not Allowed)

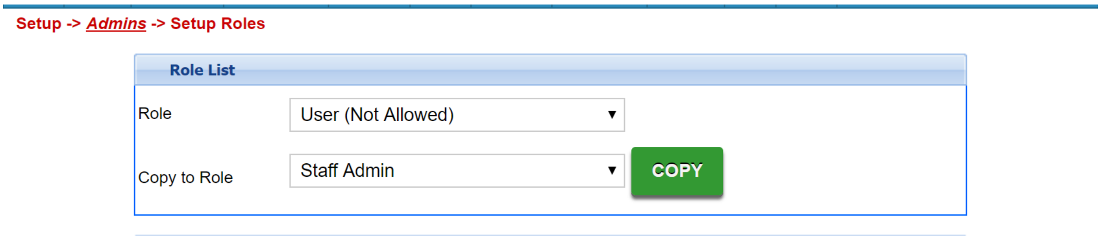
Copy to Role: Select Role

Role Activities

Category	Activity	Permission	
Account Link (Upper Right Corner)		---	Update
340	Account Edit the Account Information for the user	No Permission	
Activity Task		---	Update
483	End of Billing Cycle End of Billing Cycle - change to reconcile	No Permission	
496	End Of Day Alerts End Of Day Alerts	No Permission	
484	End Of Day Task End Of Day - Close Center	No Permission	
513	End Of Week End Of Week	No Permission	
501	Post Deposit To Journal Post Deposit To Family Journal	No Permission	
Add-On Menu		---	Update
1512	Door Controller Setup Door Controller Setup	No Permission	

When all permissions have been set, press Save to continue. Go back to the Setup Admins page and edit a user to set their permission to the new role that has been configured.

Once a role has been setup, permissions can be copied to another role by selecting the role that you want to copy from in the first field (Role) and the role you want to copy to in the second field (Copy to Role). Press Copy and all permissions will be saved to the Copy to Role. Select the role in the first field (Role) to edit or review as needed.


Setup -> *Admins* -> Setup Roles

Role List

Role: User (Not Allowed)

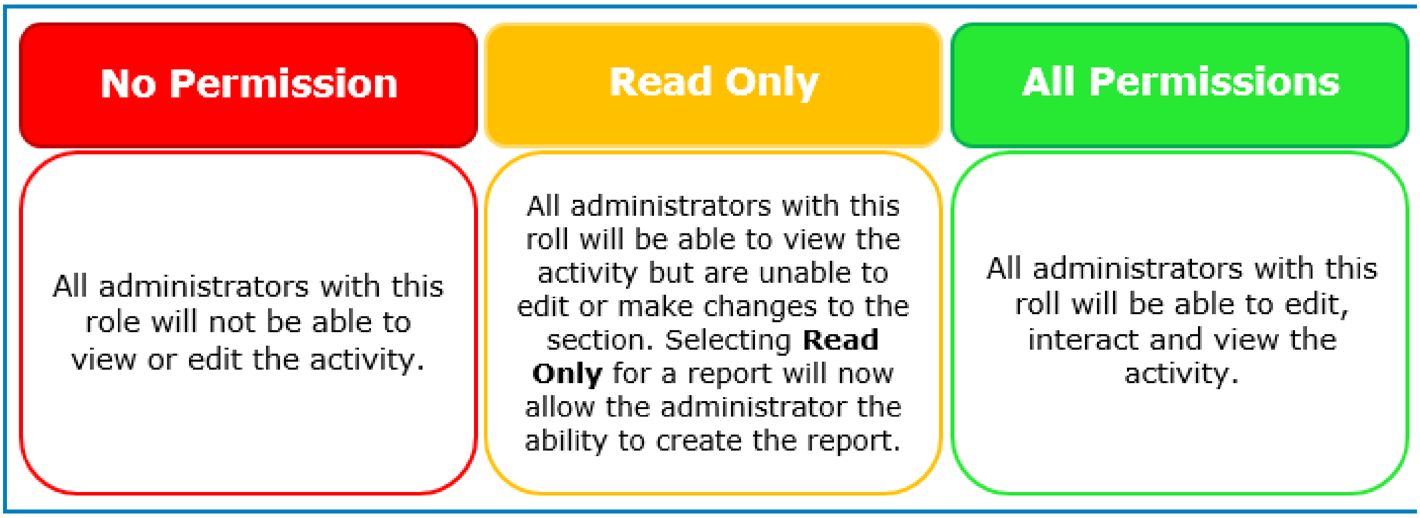
Copy to Role: Staff Admin

Admin Activities (Permissions)

Last Modified on 05/29/2018 2:39 pm EDT

Setting up or editing roles

For each permission decide if it should be set to-



No Permission

All administrators with this role will not be able to view or edit the activity.

Read Only

All administrators with this roll will be able to view the activity but are unable to edit or make changes to the section. Selecting **Read Only** for a report will now allow the administrator the ability to create the report.

All Permissions

All administrators with this roll will be able to edit, interact and view the activity.

- No Permission- will not be seen
- All Permissions- will be seen/used
- Read Only- will be view only (coming soon)

The below table displays activity ID, Activity Type and Impact-

ActivityID	Activity Type	Impact
476	# New Active Children	Displays # New Active Children in the Center Information on the home screen
477	# Withdrawn	Displays # Withdrawn Children in the Center Information on the home screen
931	Accommodations	Controls if Accommodations is displayed in the DCW Connect - Personal as a Change Field
1068	Account	Allows the user to edit their account information from the admin side of the site, the account icon is in the upper right field of the screen upon sign in
		Displays the Accounting Code field on the setup

474	Accounting Code	> room screen
921	Accounting ID	Displays the Accounting ID on the child screen of the family record
456	Accounting ID	Displays the Accounting ID on the family screen of the family record
825	Activate Parent Account	Allows a user to activate a parent account for the parent portal
828	Active Indicator Field	Allows a user to set a family as active or inactive on the family screen of the family record
1257	Active Status	Allows a parent to update the DCW Connect portal's Contact screen to set a contact as active or inactive
819	Add Adjustments	Displays the Add Adjustments report on the reports > room/program screen
1425	Add Adult Program Fee	Allows for users to use the Assignment Action - Add Adult Program Fee on the room/program tab of the family record
353	Add Assignment	Ability to Add New Room/Program Assignment on the room/program tab of the family record
1345	Add Auto-Pay Method	Ability to Add Auto-Pay Method on the autopay tab of the family record
699	Add Category Group	On the setup > room tab allows users the ability to add or update a category group
695	Add Contract	Allows users to add a contract for children on the third party tab of the family record
714	Add Late Fee	Allows ability to add a late fee on the Payments > Outstanding tab
974	Add License	Ability to add license information on the Home > General tab
1256	Add Linked Accounts	Allows parents the ability to link their accounts on the parent portal
		Allows ability to create new attendance groups on

915	Add New Attendance Group	the Setup > Room page
1513	Add New Door Controller Relay	
1484	Add New Role Attribute	
1259	Add New Student	Allows parents to add a new student from the parent portal
463	Add Portal User	Allows users to add portal user from the parent tab of the family record
464	Add Portal User	Allows users to add portal user from the parent tab of the family record
952	ADD/ADHD	Allows parents to update the ADD/ADHD field on the personal tab on the parent portal
1166	Add/View Journal Notes	
997	Additional Comments	
956	Additional Support Services	
1302	Adjustments Tab	
1371	Admin	
1028	Advanced Search	
1306	Advanced Search Link	
1266	Agency Attendance Edit	
1127	Agency Outstanding Balance version 2	
785	Allocation	
916	Allocation Refund	
1375	Allocation Reprocess Button	
1436	Allocation/Reconciliation Import	
1344	Allow Activate	
509	Allow Active Status to any other status	
703	Allow Agency Adjustment	
702	Allow Agency Payment	
641	Allow Attendance Save	
1241	Allow Auto-Pay Replace From One Time Payment Page	

1343	Allow Deactivate	
1346	Allow Delete	
917	Allow delete of document	
1187	Allow Delete of Payment.	
621	Allow Discount Selection	
636	Allow Discount Setup	
712	Allow Edit	
1498	Allow Edit	
510	Allow Enrollment Date Change	
1244	Allow parent to delete Auto-Pay account	
1243	Allow parent to edit Auto-Pay account	
1242	Allow parent to inactivate/active Auto-Pay account	
1010	Allow Recurring Setup	
1128	Allow Recurring Setup	
1397	Allow Reporting Category Exclusion	
640	Allow Save	
1347	Allow Save To Room Assignment	
1042	Allow Third Party Save	
637	Allow update to labels	
672	Alternate Third Party Allocation	
804	API	
1258	Appearance Attributes	
461	Apply Late Fees	
1111	Approve Lead	
1402	As Excel	
1401	As PDF	
1305	Assigned Batch #	
946	Asthma	
1200	Asthma/Inhaler	
1423	At a Glance Tab	

1548	Attendance Detail Export - Excel	
486	Attendance FTE	
1114	Attendance Journal	
1422	Attendance Tab	
926	Attended Previous After School Program	
1292	Attended Previous Preschool, Pre-K, or K program	
925	Attended Previous Summer Program	
953	Autism	
1293	Auto Allocate	
1030	Auto Complete Search	
1483	Auto-Pay Config	
489	Average Age	
1129	Batch Enroll	
1398	Batch Job Audit	
954	Behavioral Issues	
879	Billing	
878	Birthday Summary	
933	Booster Seat	
1044	CACFP	
1377	CACFP Application Signed by Parent	
1046	CACFP Eligibility Reports	
1280	CACFP Eligibility Rollover	
1045	CACFP Setup	
1429	Camps Link	
599	Cancel Deposit	
1137	Cash Entry - Cash-Center	
1009	Center Documents	
1559	Certification Categories List	
357	Change Co-pay	
356	Change Days Scheduled	

354	Change Program	
355	Change Rate	
820	Change Room	
882	Changes	
1304	Check #	
1348	Check manual entry (Remote Deposit Capture)	
1186	Check Out Time Entry	
950	Chickenpox	
698	Clone Contract	
978	Cognitive Information Detail	
1509	Combined Mail - 5160	
1234	Comments Column	
682	config	
932	consent for the child photograph	
1004	Contact Type	
696	Convert to Split Family	
349	County	
1063	Create Teacher User ID	
1372	Create Templates	
1190	Credit Card Types	
701	Current Week Transfer To Agency	
990	Custody Papers	
1151	Custom Auto Pay Message Agreement Checkbox	
715	Custom Billing Field	
1189	Custom Data Fields	
1231	Custom One Time Payment Message Agreement Checkbox	
1367	Daily InSite Tile	
1711	Daily Sheet Timeline	
1297	Daily Sheets	

1298	Daily Sheets	
1299	Daily Sheets	
389	Dashboard Configuration	
364	Date Of Admission	
352	Date Of Birth	
365	Date of Discharge	
996	Date of Last Tetnus	
806	Delete Award	
1355	Delete CACFP Eligibility	
1206	Delete CACFP Eligibility Assignment	
700	Delete Category Group	
1360	Delete Category Image	
361	Delete Child/Student	
903	Delete Contact	
697	Delete Contract	
758	Delete Current Statement	
716	Delete Family	
717	Delete Future Contract	
1366	Delete Late Payment Fee Override	
975	Delete License	
1034	Delete Paid Schedule	
1071	Delete Registration Fee	
1175	Delete Reservation Week	
1486	Delete Role Attribute	
358	Delete Room Assignment	
482	Delete Schedule	
480	Delete School	
675	Delete Statement PDF File	
1178	Delete Student Document	
1026	Delete Third Party Holiday	
646	Delete Unallocated Third Party Payment	

972	Delete Valid Value Role	
1253	Dentist Address	
1251	Dentist Name	
1254	Dentist Phone	
1252	Dentist Practice	
600	Deposit Post Date	
1374	Deposit Reprocess Button	
948	Diabetes	
1421	Directory Tab	
1260	Display Absent/Vacation	
1324	Display active/inactive status from SIS	
1204	Display Daily Log	
1177	Display Doctor Information	
1357	Display email statements	
511	Display Inactive Status	
1082	Display Outstanding Balance on Deposit	
1359	Display Period Month and Year on Make Payment Scr	
1208	Display Possible Attendance Issues List	
1307	Display Pre-Pay Deposits	
1356	Display print statements	
1327	Display program child is attending	
512	Display Rejected Status	
1271	Display Security Questions	
1328	Display semester child is enrolled in	
1323	Display teacher(s) from SIS	
1268	Display Uneditable Reconfirmation Text	
1275	District Indicator	
348	District Office	
455	District Office	
470	Do Not Show Adjustment Type	

1198	Doctor Address	
1197	Doctor Name	
1199	Doctor Phone	
1331	Document Type	
1332	Document Type	
1333	Document Type	
1334	Document Type	
1335	Document Type	
1336	Document Type	
1337	Document Type	
1338	Document Type	
1339	Document Type	
1340	Document Type	
1341	Document Type	
1342	Document Type	
1284	Does your child have an IEP	
1512	Door Controller Setup	
1039	Door PIN Number	
923	Driver's License	
1295	E-Signature	
1352	Edit adjustment on financial ledger	
805	Edit Award	
1354	Edit CACFP Eligibility	
1364	Edit Change Date	
1526	Edit Email Invoice Pop Up	
1524	Edit Email Reminder Pop up	
1525	Edit Email Statement Pop Up	
693	Edit Existing Contract	
1025	Edit Holiday	
1365	Edit Late Payment Fee Override	
1033	Edit Paid Schedule	

1351	Edit payment on financial ledger	
1070	Edit Registration Fee	
1072	Edit Registration Fee Authorization	
1485	Edit Role Attribute	
359	Edit Room Assignment	
1250	Electronic Signature	
1329	Email Invoice Link	
1495	Email Sent Reports	
1438	Emergency Preparedness	
1001	Employee Indicator	
370	Employee Indicator	
867	Employee Status Field	
371	Employee Type	
924	Employer/School Information Section	
466	Employment/School Phone	
694	End Contract	
1303	Entry Begin and End Dates	
943	Environmental Allergy	
945	EPI Pen	
1379	Ethnicity	
1444	Evaluation Date	
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1508	Expected PrePay Total Delete	
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1445	Experience	
1247	Export	
1235	Export Calendar	
1362	Export Journal Button	
388	Export Rate Sheet	

1272	Export Recon	
1237	Export Statement to Excel	
1281	Export to Excel	
1248	Export v2	
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1108	Extra Fee Setup	
939	Extra T-Shirt	
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381	Family - Parent Tab	
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1318	Family Aging by Program Room - Excel	
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372	Family is Split Indicator	
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1146	Family Outstanding Balance - extended	
373	Family Type	
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1437	Fire Safety	
994	First Release	
920	Food Program	
940	Food/Milk Allergy	
347	Funding Status	
346	Funding Type	
350	GL Account ID	
457	GL Account ID	
951	Glasses	
1282	Grade	
911	Grand Total Family Outstanding	
1255	Guardian E-Signature	

1381	Health Review	
1261	Heath Table Label	
639	Hide Custom Billing - No	
1441	High School Diploma	
1446	Highest Degree Attained	
1521	Home Room Teacher	
992	Hospital	
465	Hours of Employment/School	
683	household	
1350	Immunization Dates Link	
1523	Immunization Waiver For Personal Conviction:	
1522	Immunization Waiver For Religious Reason	
1167	Import Funding Account	
1361	Import Master List	
706	Import Pre-Bill	
993	In an Emergency Call First	
1287	In District	
824	Inactivate Parent Account	
1246	Include Payment Corrections	
1558	Individual Training Tracking - PDF	
1202	Information Record	
934	Insect Repellant	
991	Insurance	
485	Internal Information	
1291	Interpreter Language	
1290	Interpreter Needed	
472	Invoice Hourly Immediately	
927	Is child allergic to food or other substances	
929	Is child subject to convulsions	
928	Is child usually susceptible to infections	

930	Is there any physical condition	
1059	Labor Planning	
767	Last Re-Registration Date	
1369	Lessons	
1316	Link Family Account	
1011	Live Ratio	
1060	Live View	
1532	Live View Export	
1448	Majors	
1554	Manage Program Enrollment	
1553	Manage Semester Enrollment	
885	Mass Change	
383	Mass Change	
1358	Master List Version 2 (Brightside)	
995	May not remove my child	
1439	MD Signed	
1035	Meal Entry	
1037	Meal Rates	
1036	Meal Summary	
686	mealList	
1144	Meals Import	
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1442	Medical Issues	
958	Medications	
980	Medications Indicator	
1126	Monthly Child Attendance 5 Day	
947	Motor Disorder	
977	Motor Disorder Information	
1300	Multi Payer Tax Statement	
1570	Multi Select Category Drop Down	
1514	New Door Controller Save Button	

883	New Family	
471	Number Of Units	
957	One-on-one support	
944	Other Allergy	
1432	Other Gender Option	
982	Other Medication Detail	
981	Other Medication Indicator	
955	Other Special Care	
1389	Outstanding Balance Report - Show Zero Bal Filter	
1240	Parent Portal Password Resets	
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979	Participation Restrictions Indicator	
1097	Pay Type	
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766	Payment Correction Refunds	
886	Payment Notes	
494	Payment Void	
1506	Payments Balancing Report (Tempus)	
1176	Payments Config	
1073	Payroll Period	
880	Pending Students	
1388	Pending Waitlist	
999	Percentage Paid	
938	Pickup Notes	
1262	Picture	
1370	Planning	
1209	Possible Attendance Issues List	
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647	Post Third Party Allocation	
1312	Pre-screening for early entrance GPS	

1431	Preferred Statement Method	
1510	Prepay Deposit Delete	
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1326	Primary Payer	
1228	Print Student Class Schedule	
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1527	Profile Section	
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973	program drop down	
817	Quick Links	
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1027	Quick Search	
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1550	Recurring Amt Text Leave blank to pay full balance	
1181	Recurring Option - Full Amount	
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1096	Refund Reversal	
492	Refunds	
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881	Registration	
1417	Registration (Adult) Excel	

384	Registration - Birth Cert	
385	Registration - custody doc	
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1286	Registration Information - Excel	
1411	Registration PDF	
909	Registration Search	
1412	Registration Semester Excel	
1113	Reject Lead	
1003	Release limitations/notes	
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1188	Report Authorization	
1368	Repost Allocation	
1373	Repost Deposit	
1195	Resides With	
490	Return Payment	
1552	Revenue Budget Amount	
1500	Reverse Refund Button	
1330	Room Change Request (Calendar Tab)	
1560	Room Change Request Edit/Delete Button	
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1480	Save Button on Child Health Screen	
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1083	Save Holding Account	
1084	Save Holding Account Information	
648	Save or Update Room	
649	Save or Update Room Category	
1232	Save Override button on sponsor split screen	
707	Save Pre-Bill	
1263	Save pymt details as registered pymt method Tempus	
852	Save Rate Authorization	
481	Save Schedule	
499	Save Teacher	
1047	Save To Wait List	
1081	Scan Check/CC	
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459	Schedule Override Rates	
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1274	Security Questions	
976	Seizure Date	
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1430	Session Roster	
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1069	Setup Registration Fee	
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971	Setup Valid Value Role	
1571	Show Add New Rooms/Rates Section	
1180	Show Credit Card as Autopay Payment	
1264	Show Manage Pymt Methods Link (Tempus)	
1545	Show Prepaid Deposits	
1100	Sick Time Balance	
1249	Single Signon ID	
1497	SMS	
941	Special Food Needs	
998	Special Instructions	
962	Special Training	
576	Split Fee Save	
788	Sponsor Authorization	
786	Sponsor Award	
789	Sponsor Billing Period	
1000	Sponsor Indicator	
368	sponsor indicator	
787	Sponsor Unit	
369	Sposnor Percentage	
922	SSN	
452	SSN #	
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1193	Staff Training	

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1564	State Field	
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1098	Status Type	
988	Student Email	
1205	Student Email Address	
761	Student Grade	
989	Student ID	
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1163	Summary Year End	
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936	Swim Level	
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1107	Tax Setup	
1427	Tax Statement - Excel	
1426	Tax Statement - PDF	
1443	TB XRay	
1102	Teacher Birthday	
1196	Telephone Authorization Code	
1008	Third Party Authorization Documents	
1150	Third Party Child Attendance Detail - Excel	

1007	Third Party Contracts	
1024	Third Party Holildays	
1135	Third Party Net Revenue - Extended	
1136	Third Party Outstanding Balance	
763	Third Party Payment Recovery	
764	Third Party Payment Void	
1043	Third Party Program Calendar	
1265	Third Party Program Calendar Edit	
1494	Third Party Refund	
765	Third Party Refund	
762	Third Party Return Payment	
1041	Third Party Schedule	
1191	Time Clock	
375	Timeclock Config	
1710	Timeline	
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1233	Total Deposit Column	
912	Total Family Credit Outstanding	
1130	Total family payments	
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1132	Total payments - Metro Custom	
1133	Total payroll wages	
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1546	Transfer Balance	
658	Transfer To Agency	
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1099	Twitter Name	
645	Unallocate posted payment	
1212	Update Portal User ID	

1285	Upload IEP Document	
1201	Upload Picture	
1101	Vacation Time Balance	
1203	Vacations	
1210	View # Staff with Possible Attendance Issues	
1296	View Daily Sheets	
1311	View Deposit Ticket	
638	View GL Code	
345	View Income and Payments	
1165	View Internal Notes	
1173	View Reservation Week	
1149	View Statement Details	
1238	View Statement link (PDF Statement report)	
1211	View Stud/Staff with Possible Attendance Issues	
760	View Student External System ID	
918	Voucher/EAN Exp Date	
453	Voucher/EAN Exp Date	
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919	Voucher/EAN Exp Hours	
1085	Wait List Outstanding Balance	
1415	Weekly Schedule by Grade PDF	
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1602	Allow Edit (Full)	
1624	Allow Save	
1709	Attendance Group Edit/Delete	
1708	Attendance Group Table	
1671	Best Location	
1670	Best Phone	
1596	Birthday	
1706	Capacity Field	
1647	Category Restricted Rate "Edit" Link	
1673	Cell Phone	
1713	Change ID	
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1633	Create Schedule	
1594	Currently Working and/or In Training Program	
1665	DCW Batch Number	
1649	Delete	
1597	Direct Messaging - Staff	
1639	Display Assignment Change Actions area	
1693	Document Authorization	
1659	Edit Immunizations Link	
1174	Edit/Save Reservation Week	
1674	Employer/School ID	
1002	Employer/School Information	
1576	End Date Types	
1615	Expected Hours Count	
1705	FTE Eligible	
1672	Hours of Employment	
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1700	Integration	
1573	Max Allowed Hours	

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1632	Mouse Capture Signature Fields	
1669	Other	
1599	Parent Communication - Email	
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1643	Post Deposit Button	
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1635	Print Schedule	
1614	Recurring Option - Bi Monthly	
1626	Register Contact As Volunteer	
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1692	Show Contact Door Pin Number	
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1662	Payment Delete from Deposit	

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497	Add New Teacher/Staff	
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1399	Monthly GL Summary - Excel	
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1225	Summer Activity Fee Allocation - Excel	
790	Third Party Balance Report - Excel	
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754	Trial Balance (Agency/Parent only)	
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1105	MAS 500 GL Export - Excel	
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1067	Third Party Family Copay - PDF	
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1543	Future Billings Detail Report - PDF	
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1065	Deferred Revenue - Excel	
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475	Add Coupon	
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609	Add New Agency Billing Period	
49	Add New Campaign	
287	Add New Category	
132	Add New Event	
44	Add New Lead	
142	Add New Link	
324	Add New Meal	
325	Add New Meal Rate	
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296	Add New Question	
300	Add New Question	
312	Add New Rate Category	
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286	Add New Room	
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158	Child	
404	Child Attendance Detail - Excel	
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1353	Child CACFP Eligibility	
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850	Communication	
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467	Coupons	
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162	Current Week Roster Report - PDF	
807	Custom Report Setup	
619	Customer Statement	
427	Daily Group Signin (Compressed) - PDF	
65	Daily Log	
292	Daily Room Availability	
33	Dashboard - Tab	
234	Date Received	
133	Day Within Calendar	
412	Days Enrolled - Excel	
338	Delete Admin	
608	Delete Agency Billing Period	
581	Delete Attendance	
654	Delete Certificate	
84	Delete Fee	
323	Delete Meal Icon	
327	Delete Meal Rate Icon	
613	Delete Overtime Setup	
854	Delete Rate Authorization	
313	Delete Rate Category Icon	
307	Delete Rate for Icon	

316	Delete Rate Offset	
604	Delete Reporting Group	
295	Delete Room Icon	
311	Delete Scholarship Icon	
617	Delete Staff Schedule	
616	Delete Teacher Availability	
620	Delete Teacher/Staff	
333	Delete Valid Value	
443	Detail All Revenue Report - Combined	
442	Detail All Revenue Report - Parent	
441	Detail All Revenue Report - Sponsor	
436	Detail FTE Revenue Report - By Age Group	
435	Detail Revenue Report - By Age Group	
108	Detail Year End	
229	Detail Year End	
406	Discharge Report - Excel	
398	Discount - Tab	
134	Display Full Screen	
135	Display PDF	
643	Display Voided	
67	Documents	
139	Documents	
322	Down	
337	Edit Admin	
607	Edit Agency Billing Period	
653	Edit Certificate	
149	Edit Family Icon	
46	Edit Lead and Wait List	
320	Edit Meal Icon	
328	Edit Meal Rate Icon	
614	Edit Overtime Setup	

853	Edit Rate Authorization	
314	Edit Rate Category Icon	
309	Edit Rate for (Future) Icon	
308	Edit Rate for Icon	
317	Edit Rate Offset	
334	Edit Valid Value	
801	Email	
100	Email Reminder	
221	Email Reminder	
99	Email Statement	
220	Email Statement	
417	Employee Student - Excel	
45	Export	
216	Export - CSV	
217	Export - PDF	
231	Export Report	
293	Extra Program Registration Info	
232	Family	
376	Family - Payment Tab	
377	Family - Payment Tab	
378	Family - Payment Tab	
379	Family - Payment Tab	
54	Family - Tab	
335	Family Check-In	
343	Family Merge	
96	Family Name	
109	Family Name	
37	Family Search - Tab	
20	Family-Tab	
155	Father	

82	Fee Link	
277	Fees - Tab	
103	Funding Export	
224	Funding Export	
104	Funding Export Active	
225	Funding Export Active	
105	Funding Export Terminated	
226	Funding Export Terminated	
34	General - Tab	
444	GL Adjustment Transaction Report - Combined	
69	Health	
153	Hold	
19	Home-Tab	
282	Immunization - Tab	
119	Import	
261	Import CCRL Spreadsheet	
591	Import Deposit Reconcile	
818	Import Rates	
70	Incidents	
64	Information Record	
618	Invoice Statement	
433	Labor Statistics - Excel	
78	Make Payment	
281	Meal - Tab	
428	Meal Attendance Record	
263	Meal Counts	
418	Mera FTE - Excel	
419	Mera FTE By Age - Excel	
159	Misc	
411	Missing Invoice Report - Excel	

235	Month	
429	Monthly Attendance Record - Excel	
407	Monthly Center Attendance Summary - Excel	
51	Monthly Schedule	
72	Monthly Schedule	
430	Monthly Signin - PDF	
154	Mother	
310	Name of Scholarship	
137	New Category	
140	New Category	
141	New Document	
43	New Family	
138	New Picture	
131	Next Month	
79	Online Credit Card	
106	Open Detail Export	
227	Open Detail Export	
468	Outstanding	
448	Outstanding Balance Report	
94	Outstanding Payment Report	
1391	Parent Managed Calendar	
56	Parents - Tab	
101	Pay Registered	
222	Pay Registered	
157	Payment	
98	Payment Allocation	
219	Payment Allocation	
495	Payment Change	
83	Payment Link	
97	Payment Program History	

218	Payment Program History	
93	Payment Report	
233	Payment Type	
60	Payments - Tab	
21	Payments-Tab	
445	Payroll Deduction Outstanding Report	
431	Period Sign In - PDF	
846	Personal	
80	Pickup Fee	
23	Portal-Tab	
61	Prepay - Tab	
823	PrePay Deposit	
130	Previous Month	
344	Program Wait List	
299	Quick Entry	
447	Rate Discount Report	
420	Rate Exception Summary - Excel	
276	Rates - Tab	
342	Recreate Statement	
847	Registration	
586	Registration Payment Report	
294	Registration Setup	
48	Reject	
151	Reject	
298	Remove	
25	Reports-Tab	
446	Revenue FTE Report	
438	Roll Forward - Active Only	
437	Roll Forward - Period	
156	Room	
290	Room	

264	Room Attendance	
179	Room Report - Daily Signin PDF	
171	Room Report - Online	
172	Room Report - Online (Compress)	
392	Room Schedule	
582	Room Schedule	
53	Room Semester	
74	Room Semester	
275	Rooms - Tab	
280	Schedule - Tab	
422	School Pickup Report - Excel	
802	Screen Configuration	
274	Semester - Tab	
285	Semester Information - Import	
596	Setup Allocation Period	
584	Setup Category Email Documents	
598	Setup Coupons	
597	Setup Discounts	
319	Setup Meal Rates	
302	Setup Rate Category	
303	Setup Rate Offset	
583	Setup Room Schedule	
301	Setup Scholarships	
330	Setup Valid Values	
36	Setup Validation - Tab	
28	Setup-Tab	
50	Show All	
71	Show All	
1392	Show All Schedules	
304	Show Current and Future	
289	Show/Hide	
52	Special Schedule	

73	Special Schedule	
469	Split Icon	
63	Sponsors	
279	Sponsors - Tab	
396	Staff Attendance	
394	Staff Availability	
395	Staff Schedule	
434	Staff Schedule Report - Excel	
602	Statement - Export Running Total	
266	Statement Summary	
92	Statement Summary - Tab	
800	Storage	
421	Student Schedule Summary - Excel	
269	Student/Child Directory	
803	Task Schedule	
408	Teacher Attendance Detail - Excel	
336	Teacher Check-In	
268	Teacher CPR Alerts	
27	Teacher-Tab	
393	Teacher/Staff Edit	
651	Third Party Payment Correction	
236	Total Amount Due	
111	Total Amount Paid	
237	Total Amount Paid	
321	Up	
329	Use Wizard Setup	
59	Vacation - Tab	
278	Vacation - Tab	
205	View Available Merged Documents	
605	View Reporting Groups	
585	View Returned Payment Fee	

291	View Semester	
331	View Touch Screen	
81	View/Change Fee/Adjustment Information	
718	Voided Payments	
432	Weekly AM/PM Signin PDF	
809	Write-Off Family Bad Debt	
966	Absent Days Taken- Excel	
1031	Absent Roster - PDF	
632	Active Not Attending - PDF	
1563	Actively Enrolled Children w/o Schedules - Excel	
1216	Actual Attendance AM/PM - Excel	
587	Agency Attendance Detail - Excel	
1217	AM/PM Month Counts - Excel	
1630	Arizona DES SignIn/SignOut Report - PDF	
1516	Attendance Audit - Excel	
601	Attendance Log - PDF	
543	Attendance Statistics Summary - Excel	
967	Attendance Termination - Excel	
516	Attendance/Term Exception - Excel	
1592	Audit Trail - Excel	
517	Center Attendance Summary - Excel	
559	Child Attendance (Actual Agency) - PDF	
969	Child Attendance Detail (Version 2) - Excel	
541	Child Attendance Detail - Excel	
522	Child Attendance Reconcile Summary - Excel	
589	Child Withdrawal Detail - Excel	
725	Class Count (Version 2) - PDF	
723	Class Count - PDF	
815	Classroom Assignments - Excel	

1587	Classroom Assignments - PDF	
530	Discharge Report - Excel	
711	Food Attendance - Excel	
563	Head Count - PDF	
905	Head Count Center - PDF	
1677	Historical Flash Count Enhanced - Excel	
630	Historical Flash Counts - Excel	
631	Historical Flash Counts - PDF	
865	Hours Attending - Excel	
1505	Infractions Report	
1595	Meal Attendance Record - Daily Backup - PDF	
1386	Monthly Attendance By Classroom - Excel	
1449	Monthly Center Attendance Summary - Excel	
188	Monthly Child Attendance (10 Day) - Excel	
1074	Monthly Child Attendance (3 Day) - Excel	
1141	Monthly Child Attendance (5 Day) - Excel	
1118	Monthly Child Attendance (5 Day) - Marketing - Ex	
556	Monthly Child Attendance (Actual Agency) - Excel	
560	Monthly Child Attendance (Actual) - PDF	
1277	Monthly Child Attendance (Audit) - Excel	
185	Monthly Child Attendance (Compressed) - Excel	
184	Monthly Child Attendance (Empty) - Excel	
187	Monthly Child Attendance (T-Report) - Excel	
1565	Monthly Child Attendance By Day - Excel	
1152	No Parent Sign In/Out - Excel	
1076	Ohio Absent Days Claim (Schedule)	

768	On Demand - Excel	
769	On Demand Exception - Excel	
1695	Parent Managed Schedule-Attendance - Excel	
1093	Registration Snapshot - PDF	
186	Room Report - Monthly Child Attendance Actual	
813	Schedule - Attendance - Excel	
1547	Schedule Report with Absences - Excel	
1218	Semester Enrollment Summary - Excel	
677	Semester Summary - Excel	
1572	Sign In/Out Sheet (Version 4) - PDF	
551	Site Summary Attendance - Excel	
1664	SSH - Student Schedule Summary	
722	Student Class Schedule - PDF	
1650	Student Schedule Start/End - Excel	
544	Student Schedule Summary - Excel	
1086	Student Schedule Summary Status - Excel	
1686	Student Totals - Excel	
710	Student Totals - PDF	
1491	Subsidy Child Attendance - Excel	
745	Third Party Absent Day Billing - Excel	
1154	Third Party Child Attendance Detail - PDF	
1680	Third Party Child Attendance Detail Without Sig.	
721	Third Party Schedule vs Actual Report - Excel	
1530	Tour Hours Summary - Excel	
776	Unscheduled Attendance Days - Excel	
1517	Weekly Attendance - Excel	
984	Weekly Ohio Absent Days to Claim - Excel	

561	Weekly Schedule By Grade - PDF	
562	Weekly Schedule By Name - PDF	
892	Age Up Alert - Excel	
872	Arrival/Departure - Excel	
1092	Audit Trail - PDF	
526	Birthday - Excel	
855	Birthday Info (Version 2) - Excel	
1584	Birthday Info (Version 2) - PDF	
775	Check In/Out PIN # Report - Excel	
913	Check In/Out PIN - PDF	
835	Child Birthday Information - Excel	
588	Child Directory Detail - Excel	
1428	Child Rate - Excel	
1578	Child Retention - Excel	
1301	Child Retention - PDF	
626	Child Status Sheet - Excel	
627	Child Status Sheet - PDF	
1054	Child Supervision Record - Excel	
770	Child-Family-Room Center Mismatch - Excel	
821	Child/Family PIN - Excel	
1117	Children With Inactive Rates - Excel	
1119	Children With Zero Billing - Excel	
836	Credit Card - Excel	
1562	Discount Assignment - Excel	
1519	Discount Assignment - PDF	
1714	Emergency Contacts - PDF	
521	Employee Student - Excel	
1627	Extra Fee Quantity Report - Excel	
1637	Family Registration Report - Excel	
1531	Family Status Tracking - Excel	
1629	Incident Report Summary	

829	Income Bracket (Version 2) - Excel	
862	Income Bracket - Excel	
830	Income Bracket By Room - Excel	
890	Pending Student List - Excel	
778	Photo Consent Report - Excel	
1109	Potential Inactive Families - Excel	
1110	Potential Inactive Families - PDF	
1315	Program Wait List - Excel	
1400	Program Wait List Currently Pending - Excel	
1515	Progress Report Due List - Excel	
904	Raptor Report - Excel	
857	Scheduled FTE Summary -Excel	
1684	Scheduled Tuition FTE Summary -Excel	
719	Split Family Information - Excel	
832	Student Registration - Excel	
831	Student Wait List - Excel	
870	Swim Concerns - Excel	
656	Third Party Children - PDF	
566	Third Party Info - Excel	
1699	Transition Report	
523	Center Copay Collection Summary - Excel	
528	Center Copay Discount - Excel	
527	Missing Invoice Report - Excel	
1465	Bi Weekly Schedule - Excel	
772	Capacity Enrollment Remaining - PDF	
1685	Center Weekly Change - Excel	
1385	Contracted Hours - Excel	
520	Days Enrolled - Excel	
782	Early Learn NYC Enrollment Grid - Excel	
1590	Enroll/Withdrawal (Version 2) - Excel	
773	Enroll/Withdrawal - Excel	

864	Enrollment Count - Excel	
964	Enrollment Count Room/Staff - Excel	
189	Enrollment Grid - Excel	
190	Enrollment Grid (Month End) - Excel	
968	Enrollment Grid (No After School) - Excel	
737	Enrollment Grid (Version 2) - Excel	
889	Enrollment Grid By Funding Type - Excel	
519	Enrollment Schedule Grid - Excel	
1621	Enrollment Summary Report - Excel	
893	Future FTE Count - Excel	
736	Future Head Count Report - Excel	
1215	Home Center Count - Excel	
1078	Room Assignment Change - Excel	
816	Session Enrolled Report - Excel	
1676	SIS Summary - CSV	
1157	Unique Enrollment and Check In - Excel	
1156	Unique Enrollment Count - Excel	
1533	As PDF - Future	
1267	Online View with Multiple Semesters	
176	Room Report - As Excel - No Total	
173	Room Report - As PDF	
175	Room Report - As PDF - No Total	
1567	Tournament/Room Report	
524	Adverse Action Report - Excel	
525	Adverse Action Summary - Excel	
1511	Allergy & Special Care List - PDF	
986	Allergy And Emergency Contacts - PDF	
1660	Allergy/Alert - Excel	
674	Allergy/Alert - PDF	
1458	Allergy/Alert - PDF - Full List	
869	Child Health Care Addendum - PDF	
1568	Full Health/Allergy Details For Center - PDF	

871	Health Concerns - Excel	
1503	Health/Allergy - Full List - PDF	
1012	Immunization (Version 1) - Excel	
1013	Immunization (Version 1) - PDF	
731	Immunization - Excel	
732	Immunization - PDF	
1642	Immunization Missing Report - PDF	
730	Immunization Summary - PDF	
594	CACFP Enrollment Summary - Excel	
1383	CACFP Individual Infant Meal Record - PDF	
622	CACFP Meal Service Action - Excel	
1207	CACFP Meal Service No Selections - Excel	
623	CACFP Meals Outside Scheduled Time - Excel	
1384	CACFP Milk Usage Calculator - Excel	
1380	CACFP Participants Roster - PDF	
861	Food Production - Excel	
1601	Food Program Weekly Tally Sheet	
1453	Meal Attendance Record (Version 1) - PDF - Blank	
1452	Meal Attendance Record (Version 2) - PDF	
1688	Meal Attendance Record (Version 3) - PDF	
1589	Meal Attendance Record - Daily Backup - Excel	
593	Meal Attendance Record - Excel	
1457	Meal Attendance Record - Excel (Monthly)	
536	Meal Attendance Record - PDF	
1461	Meal Attendance Record Full - Excel	
1104	Meal Served By Day - PDF	
592	Monthly Food Spreadsheet - Excel	
1094	Time Meal Served - Excel	

538	Center Gain Loss- Excel	
1459	Client Gain Loss (Monthly) - Excel	
777	Client Gain Loss - Excel	
663	Corporate Partnership & Local Business Discount	
635	Corporate Partnership - Excel	
708	Denial NES - Excel	
1103	Extended Registration - Excel	
1668	Extended Registration Questions (Version 2) - PDF	
1534	Extended Registration Questions - Excel	
1651	Extended Registration Questions V2 - Excel	
1667	Facility Licensing Report - Excel	
1172	Lead Activity Summary - Excel	
1544	Lead Management Summary - Excel	
540	Mera FTE By Age - Excel	
203	NES Report - Excel	
555	Pending Registration - Excel	
779	Potential Duplicate Account - Excel	
963	Rate Authorization - Excel	
518	Rate Exception Summary - Excel	
1456	Ratio Month - Excel	
709	Ratio Report - Excel	
1089	Recreate Audit Trail - Excel	
1090	Recreate Audit Trail - PDF	
720	Registration Information - Excel	
204	Room Report - Title XX - Excel	
1049	Selected Sponsors - Excel	
874	Task List Summary - Excel	
914	Third Party Authorization - Excel	
1220	Transportation Profile - PDF	

546	Voucher Expiration - Excel	
673	Authorized Pickup - PDF	
729	Authorized Pickup Report - PDF Version 2	
727	Restricted Pickup List - PDF	
735	Restricted Pickup List - PDF - Full List	
515	School Pickup - Excel	
856	Activity Roster (Version 2) - Excel	
838	Activity Roster (Version 2) - PDF	
863	Activity Roster - PDF	
1115	Activity Roster - PDF - Attendance	
894	Adventure Guides Event Roster - Excel	
1061	Adventure Guides Event Volunteer Roster - Excel	
895	Adventure Guides Program Roster - Excel	
1062	Adventure Guides Program Volunteer Roster - Excel	
553	Bus Roster - PDF	
1687	Bus Roster Sign In - PDF	
1481	Bus Roster v2 - PDF	
1451	Center Roster (Month) - Excel	
198	Center Roster (Period) - Excel	
985	Current Roster - Excel	
1418	Current Roster v2 - Excel	
558	Enrichment Roster - PDF	
199	Event Roster - Excel	
780	Event Roster Version 2 - Excel	
726	Facility Roster - PDF	
1555	Field Trip Roster - PDF	
1482	Flex Reg Roster - PDF	
1321	Program Roster - PDF	
1492	Registration Roster - Excel	

196	Roster (by program) - Excel	
194	Roster (by student) - Excel	
195	Roster (by student) - PDF	
193	Roster (Program Detail) - PDF	
191	Roster - Excel	
192	Roster - PDF	
197	Roster Extended - Excel	
1450	Roster Extended V2 - Excel	
1663	Roster Report - PDF	
1048	School Roster - PDF	
200	Semester Roster - Excel	
1376	Session Roster - Excel	
1349	Weekly Roster Sign In - PDF	
554	Weekly Roster Summary - Excel	
557	Weekly Roster Summary - PDF	
1537	Weekly Schedule Roster - Excel	
1493	Weekly Schedule Roster - PDF	
537	Attendance with Symptoms Record - Excel	
859	Bi Weekly Sign In - PDF	
744	Center Sign In - Excel	
970	Center Sign In For Week - PDF	
1435	Center Sign In Ver 2 - PDF	
743	Center Signin - PDF	
182	Daily Alt Sign In - PDF	
741	Daily Alt Sign In - PDF - By Grade	
858	Daily Group Sign In (Compressed) - PDF	
738	Daily Sign In - Excel - By Grade	
739	Daily Sign In - Excel - By Name	
180	Daily Sign In - PDF	
733	Daily Sign In - PDF - By Grade	
734	Daily Sign In - PDF - By Name	

1656	Daily Sign In/Out by Age - Excel	
1655	Daily Sign In/Out by Age - PDF	
676	Daily Signin For Week - PDF	
728	Daily Signin For Week - PDF Version 2	
181	Daily Signin PDF Full Signature	
552	Field Trip Permission Slip - PDF	
724	Field Trip Permission Slip (Version 2) - PDF	
771	Kiosk Sign In/Out Sheet - Excel	
774	Kiosk Sign In/Out Sheet - PDF	
535	Monthly Attendance Record - Excel	
529	Monthly Sign In - PDF	
183	Monthly Sign In - PDF	
742	Monthly Sign In (Version 2) - PDF	
1014	Monthly Sign In (Version 4) - PDF	
965	Monthly Sign In - PDF - Version 3	
533	Period Sign In - PDF	
624	Room Movement Sign In-Out Sheet - Excel	
625	Room Movement Sign In-Out Sheet - PDF	
178	Room Report - Weekly AM/PM Signin PDF	
534	Sign In/Out Sheet - Excel	
1454	Sign In/Out Sheet (Version 2) - PDF	
1455	Sign In/Out Sheet (Version 3) - PDF	
549	Sign In/Out Sheet - PDF	
202	Weekly Center In/Out - Excel	
201	Weekly Center Sign In - Excel	
814	Weekly Sign In (Version 2) - Excel	
740	Weekly Sign In (Version 2) - PDF	
839	Weekly Sign In (Version 3) - Excel	
837	Weekly Sign In (Version 3) - PDF	
868	Weekly Sign In (Version 4) - PDF	
1666	Weekly Sign In (Version 5) - Excel	

1171	Weekly Sign In (Version 6) - Excel	
1016	Weekly Sign In (Version 6) - PDF	
1322	Weekly Sign In (Version 7) - PDF	
1682	Weekly Sign In (Version 8) - Excel	
1694	Weekly Sign In (Version 9) - Excel	
177	Weekly Sign In - PDF	
888	Weekly Sign In - PDF - Version 5	
1015	Weekly Sign In/Out W/AM-PM Verification- Excel	
1116	Weekly Sign In/Out W/AM-PM Verification- PDF	
841	Weekly Sign In/Out-Ontario- Excel	
842	Weekly Sign In/Out-Ontario- PDF	
1681	Weekly Sign In/Out-Period- PDF	
1658	Admin Report - Excel	
1490	ADP Hours Export (SSH) - CSV	
1077	ADP Hours Export - CSV	
1535	ADP Staff Tuition Export - CSV	
1646	ADP Times Export - CSV	
1382	CACFP Weekly Time Sheet	
1056	California Time Sheet - PDF	
1502	CBSD Staff Contract - PDF	
1528	CBSD Staff Info - Excel	
1529	CBSD Staff Info - PDF	
887	CCSD Employee Time Card - PDF	
1051	CDI Staff Credential - PDF	
1121	Daily Potential Payroll Issues - Excel	
1122	Daily Potential Payroll Issues - PDF	
1582	Daily Potential Violations - Excel	
1058	Daily Potential Violations - PDF	
1489	Daily Staff Hours (Care Code) - Excel	

783 784	Daily Staff Hours - Excel Daily Staff Hours - PDF	
1488	Daily Staff Rounded Hours - Excel	
1120	Daily Staff Rounded Hours - PDF	
873	Duplicate DoorPin - Excel	
781	Employee - Excel	
564	Employee Time Card - PDF	
547	Hours Export - CSV	
1539	Individual Training Tracking - PDF	
1057	Labor Actual Hours - Excel	
1087	Labor Hours & Wages - Excel	
1698	Labor Hours & Wages - Excel - Ver. 2	
1088	Labor Hours Comparison - Excel	
1641	Labor Hours Variance Report - Excel	
508	Labor Report - Excel	
1050	Labor Rounded - Excel	
906	Labor Statistics (Brightpath Kids) - Excel	
532	Labor Statistics - Excel	
1463	Management Check Ins/Outs Adjustment Log - Excel	
1580	Management Check Ins/Outs Adjustment Log - PDF	
1219	Missing Mandated Reporter Certificate - Excel	
1577	New Staff Export - CSV	
1245	Paid Time Off - Excel	
1675	Paycom Hours Export - CSV	
1075	Paycor Hours Export - Text	
548	Payroll Hours Export - CSV	
1155	SSH Employee Time Card - PDF	
1661	Staff Attendance Report - Excel	
1640	Staff Availability - Excel	

834	Staff Certificate - Excel	
1678	Staff Certificate Expire - Excel	
1055	Staff Certificate Expire - PDF	
1053	Staff Data- PDF	
1501	Staff Details - PDF	
1549	Staff DPW Audits - PDF	
1561	Staff Letter	
1079	Staff Payroll (ECS-PUF) - CSV	
860	Staff Payroll - CSV	
1214	Staff Payroll - CSV (OuiPay)	
1586	Staff Payroll Control - Excel	
822	Staff Payroll Control - PDF	
1585	Staff Payroll Control Detail - Excel	
833	Staff Payroll Control Detail - PDF	
1579	Staff Payroll Control Detail With Wages - Excel	
1239	Staff Payroll Control Detail With Wages - PDF	
840	Staff Payroll TimeSheet- Excel	
1052	Staff Records Grid-Star 4- PDF	
531	Staff Schedule Report - Excel	
1504	Staff Sign In by Category - PDF	
1229	Staff SignIn Job Sheet- PDF	
891	Staff SignIn Sheet- PDF	
550	Staff Summary Export - CSV	
1618	Summary of Individual Training Tracking - Excel	
542	Teacher Attendance Detail - Excel	
565	Teacher Attendance Detail - PDF	
1153	Teacher Roster - Excel	
1691	Time Sheet (Rounded) - PDF	

1462	Violation Summary - Excel	
1581	Violation Summary - PDF	
1363	Wage Enhancement Export - CSV	
1170	Weekly Payroll - Excel	
1556	Ccis Pelican - XML	

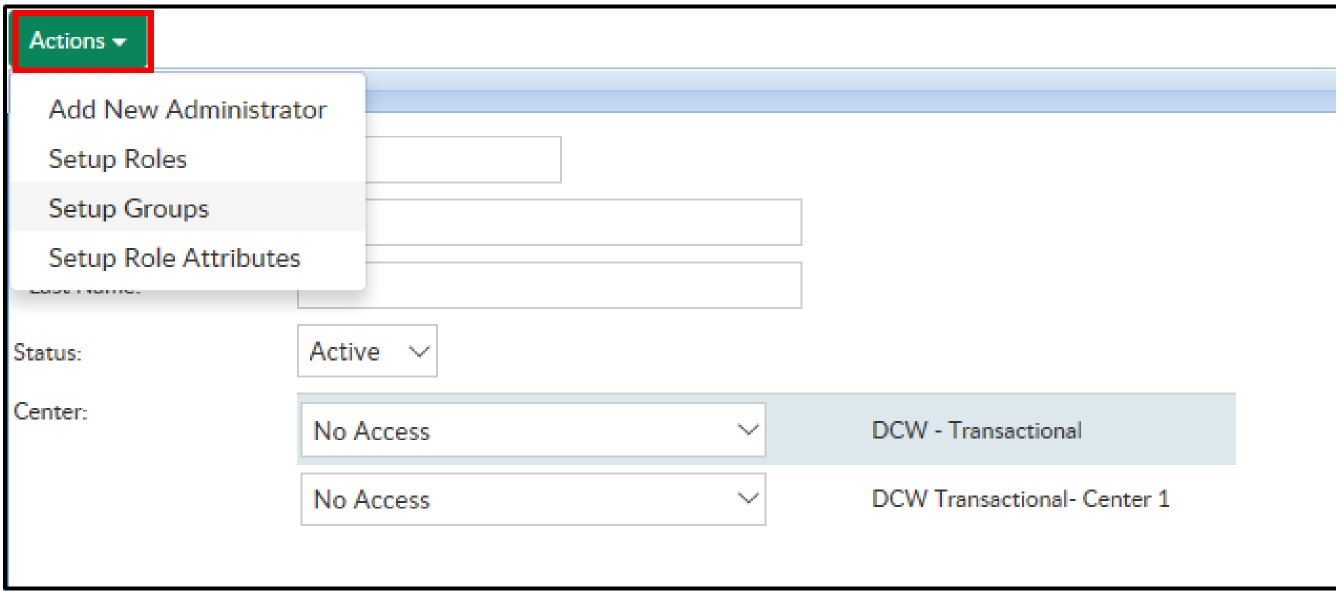
Admins, Setup Groups

Last Modified on 12/04/2018 10:18 am EST

Setting up groups allows administrators to group individuals together to give/remove certain permissions.

To setup a group:

1. To setup a Group, click Action



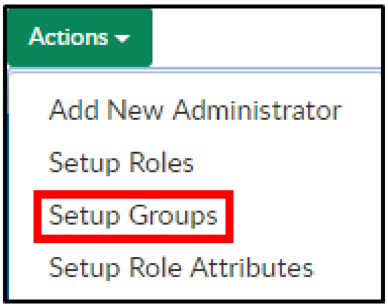
Status: Active

Center:

No Access DCW - Transactional

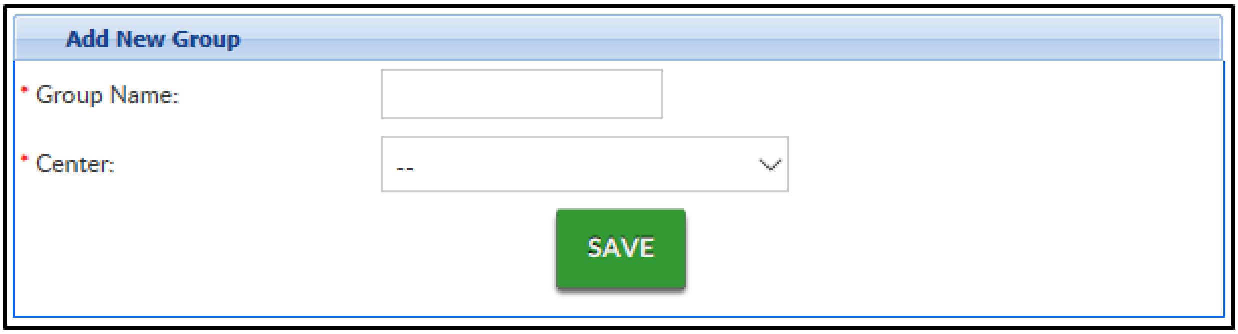
No Access DCW Transactional- Center 1

2. Select Setup Groups



3. Click Add Group

4. Complete the Add New Group section

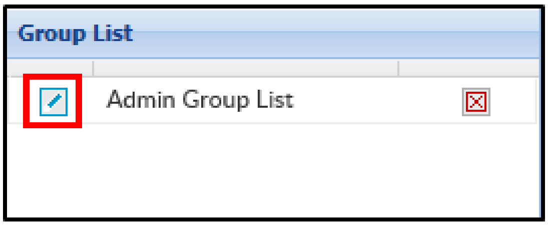

Add New Group

* Group Name:

* Center: --

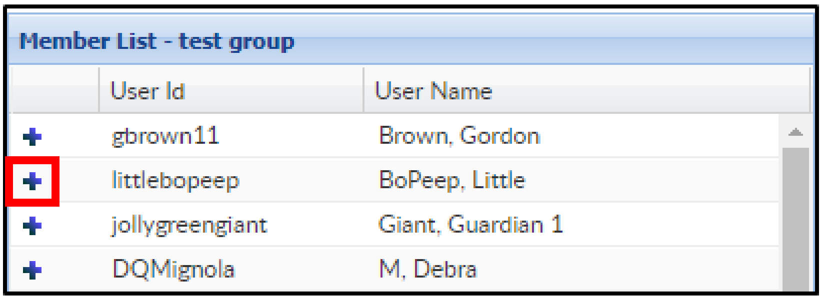
- Enter a Group Name - this is the name of the group or role
- Select the Center or business level from the drop-down

5. Click Save
6. Click the Edit icon to the left of the group name to add users to the lists


Group List

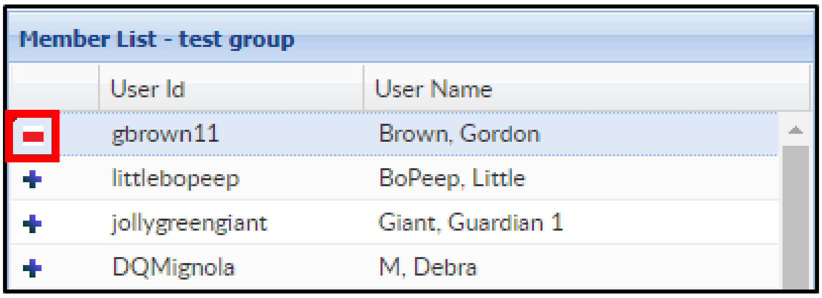
Admin Group List

7. Click the + icon to add users to the group


Member List - test group

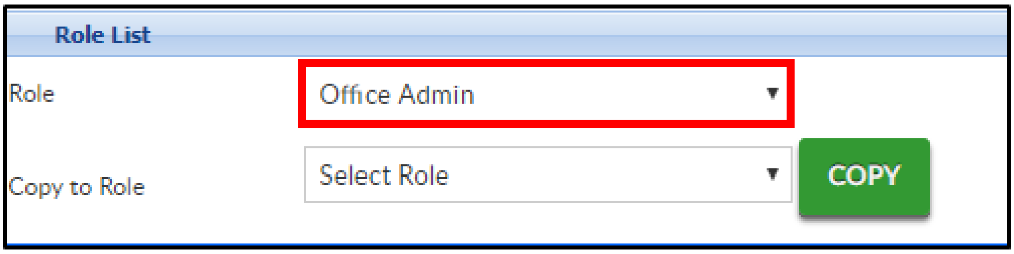
	User Id	User Name
+	gbrown11	Brown, Gordon
+	littlebopeep	BoPeep, Little
+	jollygreengiant	Giant, Guardian 1
+	DQMignola	M, Debra

8. If the person is already a member, the + icon will turn to a - icon


Member List - test group

	User Id	User Name
−	gbrown11	Brown, Gordon
+	littlebopeep	BoPeep, Little
+	jollygreengiant	Giant, Guardian 1
+	DQMignola	M, Debra

Please Note: To setup roles for the group added above click here . On the Setup Roles screen, select the name of the group created


Role List

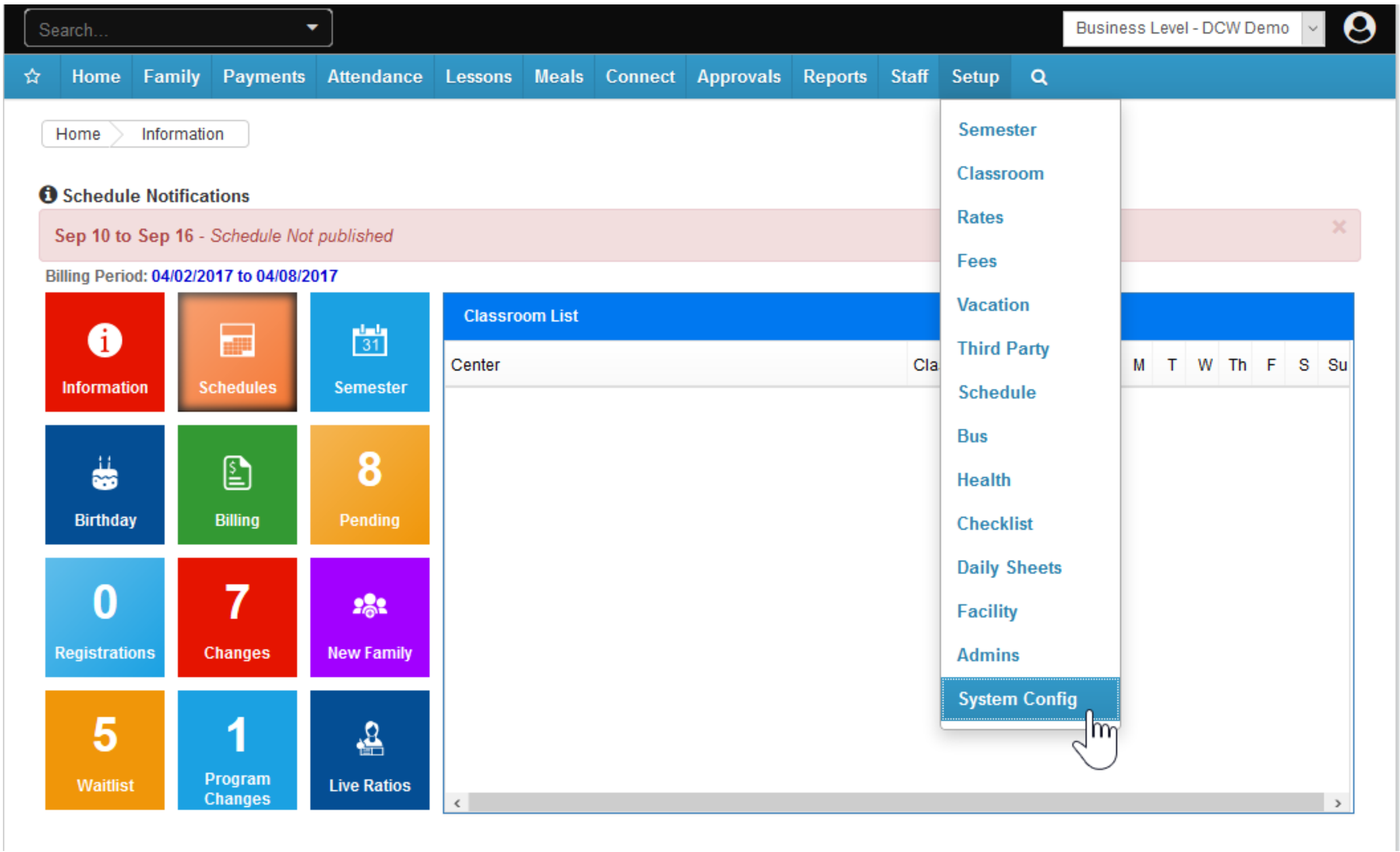
Role: Office Admin

Copy to Role: Select Role

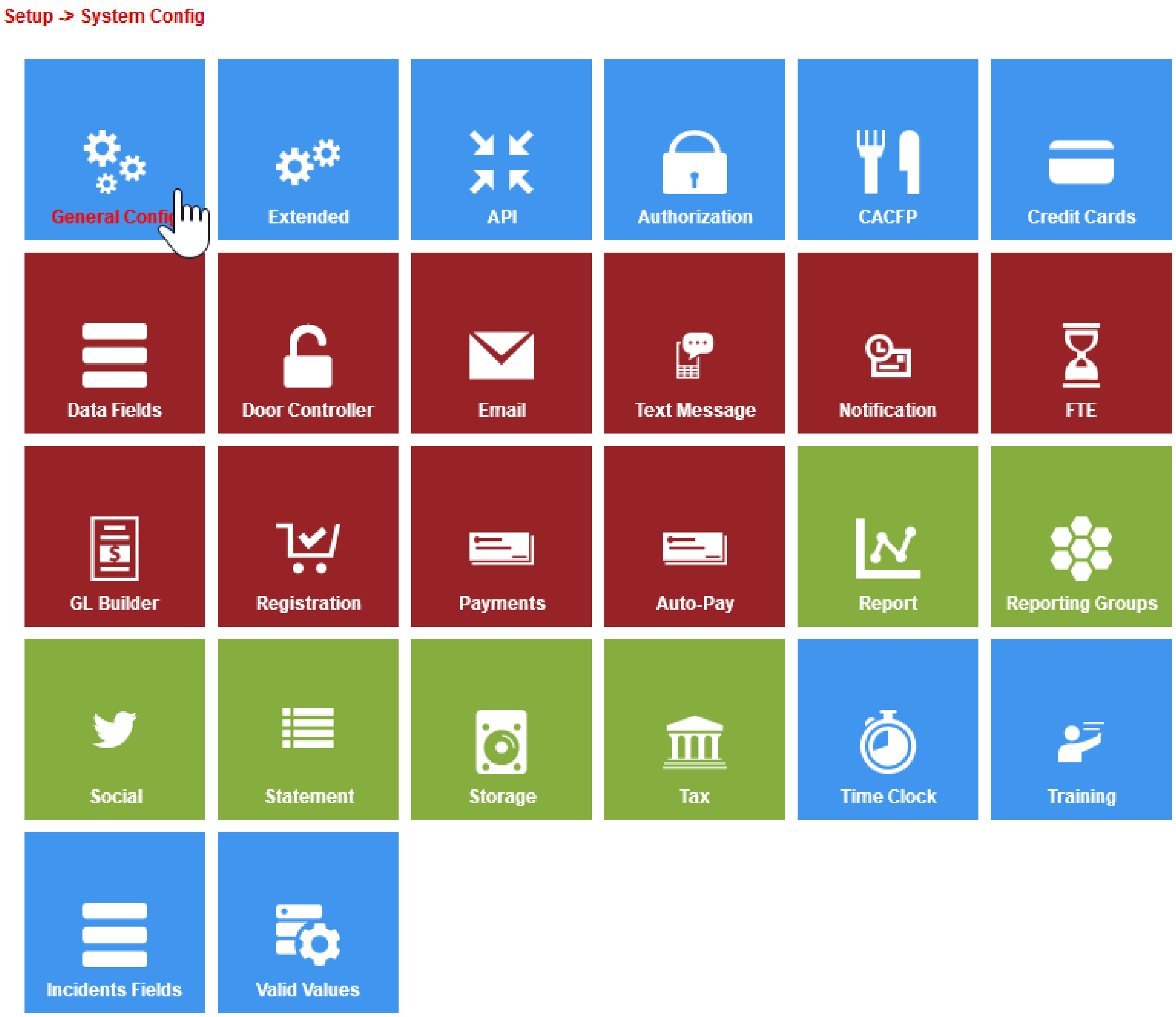
System Config > General Config, Statement

Last Modified on 03/14/2018 9:38 am EDT

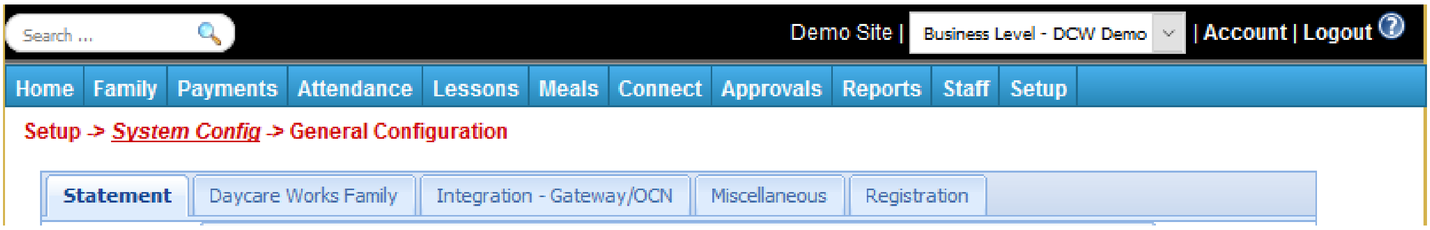
From the Setup menu select the System Config option



Then select the General Config tile



The first tab is the **Statement** tab.



In the **Tax ID** field enter your business' tax identification code (t*his tax identification code will be printed on billing statements for parents).*

Then select the billing period for the center in the **Billing Period** drop down list (Required)

- Defined Billing Periods allow centers the ability to generate billing periods and determine when billing should be generated for families, this means that you only bill for one set period of time- usually if you ONLY bill weekly or ONLY bill monthly. This option allows you to recreate billing for that set period- which is helpful for reconciliation purposes.

- Transactional billing allows a center to have multiple monthly and weekly billing periods within one center, this may mean your center has a Preschool program that bills monthly and a School Age program that bills weekly.

The **Allow Multiple Tuitions** option allows you to select if you will have different types of programs for kids enrolled in your sites.

- Select Yes if your business allows a child to register for multiple classrooms, activities or events in the center in the Allow Multiple Tuitions drop down list.

The **Open Weekends** field allows you to select if your business is open on Saturday and Sunday.

- Select **Yes** if your business is open for children during the weekends

Start Date for Billing allows you to select the day you would like your week to start on.

- If your business is using parent managed calendars, select Sunday

If your business has an **hourly rate**, select the hourly rate in the **Allow Hourly Rate/Statement Text** drop down list. Then, enter a description of the hourly rate for parents in the text box (optional).

- Select how the hourly rate will be billed in the Hourly Rate drop down list. *Hourly rates can be billed based on attendance or on* schedule for the child.
  - None: Select None if the center has no hourly rates.
  - Hourly Billing: Select Hourly if billing is based on the total time spent in the center. *For example, 2:15 PM – 3:15 PM would be charged one hour.*
  - Strict Hourly Billing: Select Strict Hourly Billing if billing is based on the hour time spots spent in the center. *For example, 2:15 PM – 3:15 PM would be charged two hours, 2:00 PM - 3:00 PM & 3:00 PM - 4:00 PM.*
  - Half-Hour Billing: Select Half-Hour Billing if billing is based on the half hour

time spots spent in the center. *For example, 2:15 PM – 3:15 PM would be charged 2 half-hours.*

  - Half-Hour Strict Billing: Select Half Hour Strict Billing if billing is based on half hour time spots spent in the center. For example, 2:15 PM – 3:15 PM would be charged 3 half-hours, 2:00 PM - 2:30 PM, 2:30 PM - 3:00 PM, & 3:00 PM - 3:30 PM.

Rate Categories help businesses charge different rates for the same classroom based on the family's income level, child's age or center criteria. If your business will be using rate categories to determine what rate a child will be charged, select Rate Category in the **Rate Type** drop down list. If no rate categories will be setup in the system, select Normal.

Select Manual in the **Statements** drop down list to have billing processed manually by administrators in the system.

Select Version 2 in the **Family Statement Display** drop down list. This will enable administrators the ability to make Payment Corrections, Return Payments, and Payment Refunds. If those functions will not be enabled for administrators, select Normal.

Enter the amount of absent days children are allowed to have in the business in the **Allowed Absent Days** text box. Please note, there are other additional fields to enter absent days, based on the number of days a child is scheduled.

In the **Allow Statement Details to be Deleted** field, select Yes to allow statement details, such as adjustments or payments, to be deleted on a family's financial ledger by a Super User, items will only be able to be deleted during the current active billing period.

Payments Must be associated to Program helps to control if payments have to be associated to a room/program- if you want parents to be able to make prepayments you would want to select No from the drop down list.

In the **Allocate Payments** drop down list select Yes to allocate payments to specific charges, adjustments or fees on a family's billing statement.

The **Auto Late Fee** field allows you to have a late fee automatically added to a family account, a batch job would need to be set by Cirrus Group in order for this to automatically allocate. Select No if you do not want the fee to automatically be added.

Show **Detail Post Date** controls the level of detail a family can see on their ledger for posted transactions to show detail select Yes for balance only postings select No.

The **Allow Post Date Entry** option allows administrators to enter the date the payment was posted to the financial ledger for the family after the day- example if a payment was received two weeks ago- select yes if you can date the payment as of the receipt date two weeks ago- or no if the payment should be dated with today's date. This will impact reconciliation. (Recommended: Yes)

Auto Select Child Tuition section will automatically assign tuition rates to children for the classroom (based off of the classroom's default rate) . These rates can be overridden manually on the child's program/room assignment tab. (Recommended: Yes)

Auto Determine Discounts section if set to Yes/Corporate Only only corporate discounts will be automatically applied to families. If Yes is selected in the Auto Determine Discounts section on the Statement tab in the Configuration section, a Sibling discount will not be able to be removed from a child. If No is selected, the system will not automatically apply discounts for children in the center. (Recommended: No)

The **Allow Deposit Header** option allows administrators/users the ability to edit the date for a deposit (Payments > Deposits). (Recommended: Yes)

The **Allow Control Totals** to be Updated section allows administrators/users the ability to edit the control total and deposit number in the Payments > Deposit section. If No is selected, users must cancel a deposit if a change needs to be made to a deposit. (Recommended: Yes)

The **Allow Deposit Family Search** option allows administrator the ability to search for families including guardians and contacts for a family, for deposit entry under Payments > Deposit. (Recommended: Yes)

The **Include both Parents in Search** option enables the system to display both guardians when searching for payments in the Payments > Deposit section. (Recommended: Yes)

The **Allow Deposit Agency Payment** option enables the ability to receipt third party/sponsor payments to under Payments > Deposit. (Recommended: Yes)

The Deposit – Auto Break of Credit Cards section determines if credit card payments are separated from other payment methods when posting a deposit. This is only used when using the deposit section to record credit cards that have not processed through a payment gateway in the system. (Recommended: No)

The Deposit – Allow Delete of Payment in the Receipt section determines if an administrator can delete a payment after creating a receipt on the deposit. (Recommended: No)

The Sponsor Journal – Allow Agency Payment Entry option allows HOD (third party payments) deposits to be visible on the Deposit section in the system. (Recommended: Yes)

If a discount should be displayed as a credit on a family's financial ledger, select Yes in the **Display Discount as Credit on Customer Statement** section. If No is selected, a discount will be displayed as an adjustment to a family's financial ledger.

The **Allow Payments and Fees** to be edited field determines if users are able to edit payments or fees on a family's financial ledger.

The **Remove Attendance Less Than** section helps prevent charging families attendance for children on accidental entry- enter time in number of seconds.

The **Payment Due Date** text box determines the number of days a payment is due within.

Enter any additional messages that will be displayed on the printed copies of the customer’s billing statement in the **Statement Footer** section. This section can be used to announce or advertise upcoming events in the center.

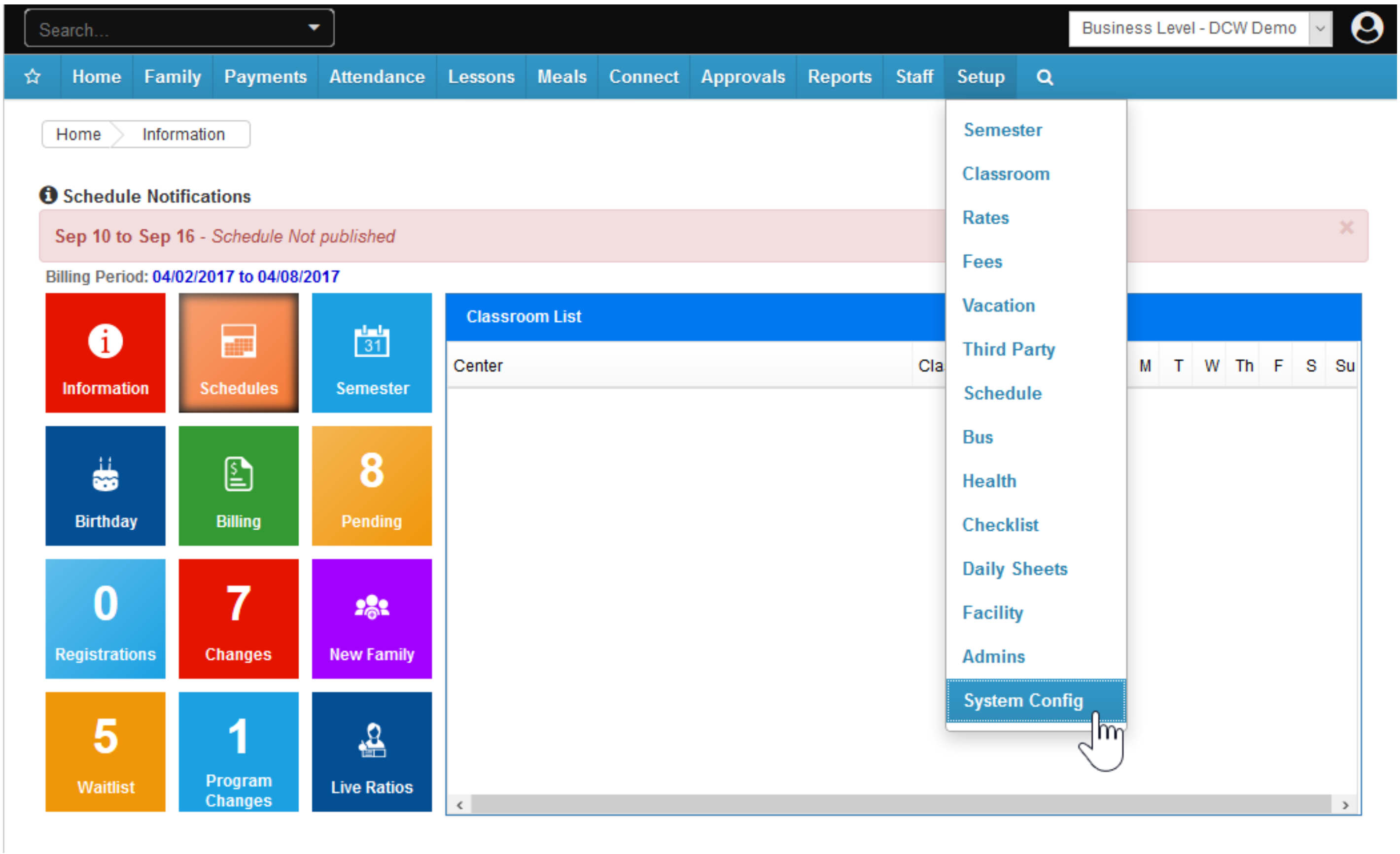
Click here to go to the next tab's configuration page!

System Config > General Config, DayCare Works Family

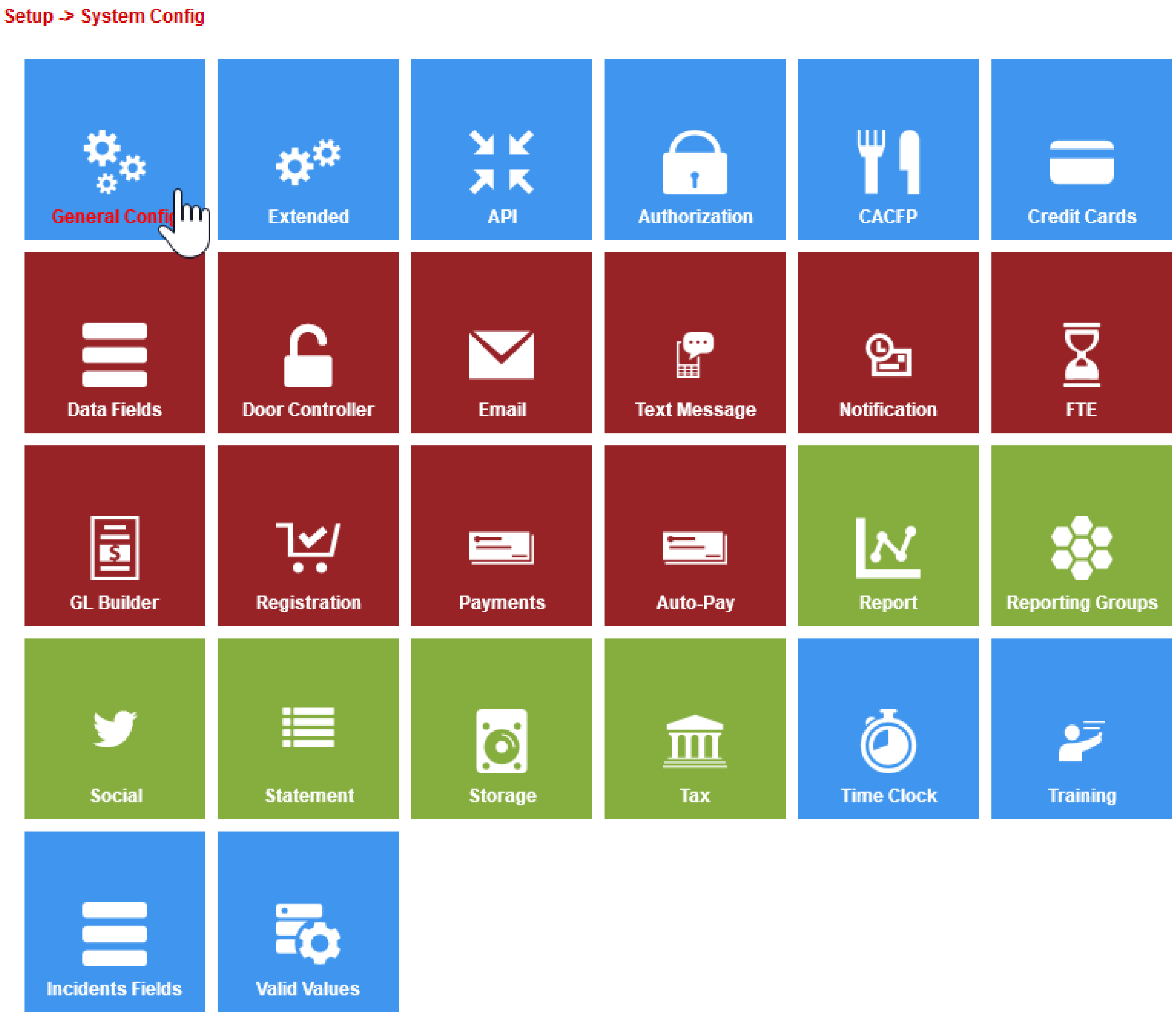
Last Modified on 03/14/2018 9:39 am EDT

Setup > System Config, General Config allows you to set generic settings for your site. This will be the first place you want to visit once you have logged in.

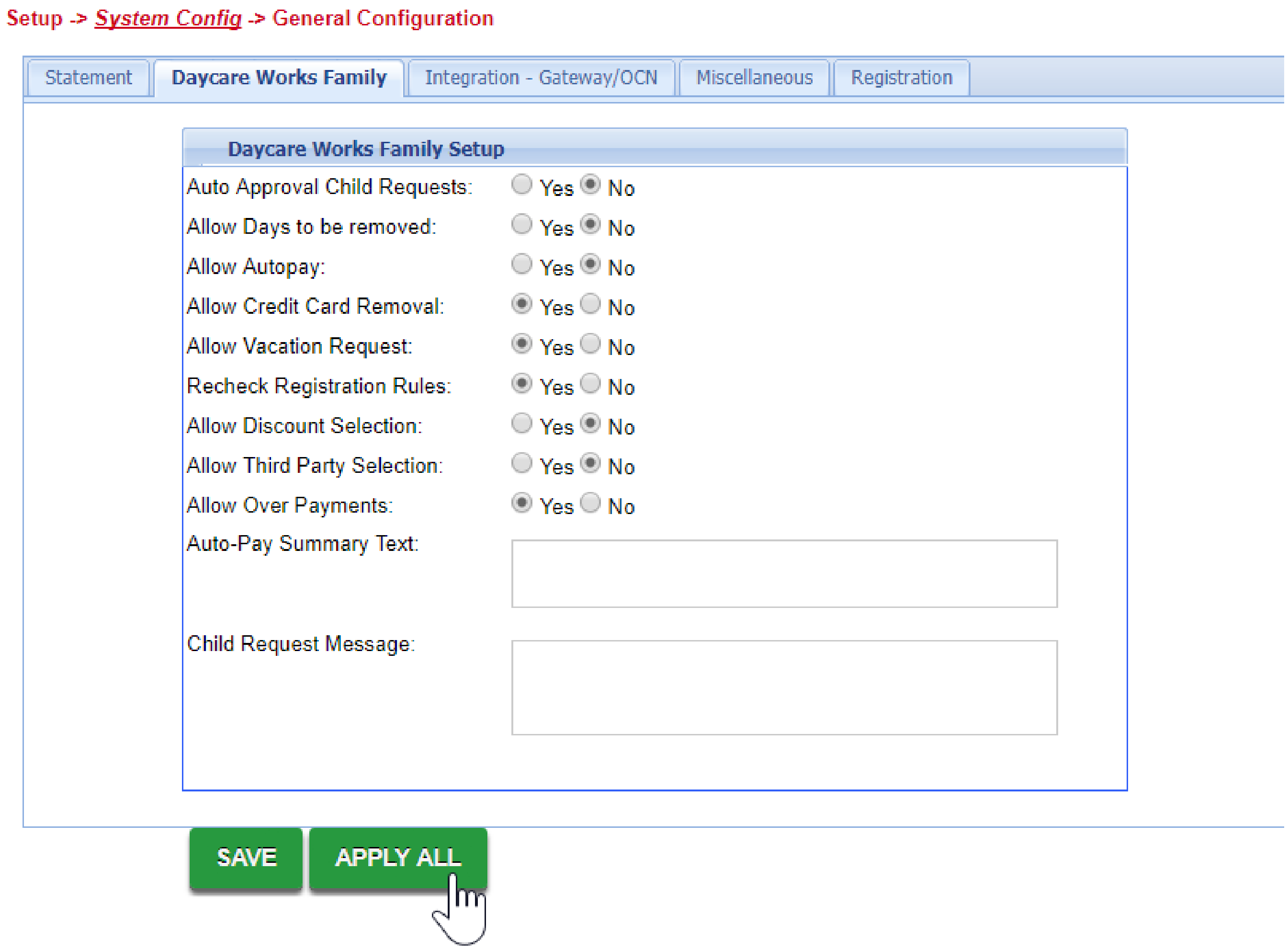
From the Setup menu select the System Config option



Then select the General Config tile



Then select Daycare Works Family tab



Daycare Works Family Setup

Auto Approval Child Requests: ○ Yes ● No

Allow Days to be removed: ○ Yes ● No

Allow Autopay: ○ Yes ● No

Allow Credit Card Removal: ● Yes ○ No

Allow Vacation Request: ● Yes ○ No

Recheck Registration Rules: ● Yes ○ No

Allow Discount Selection: ○ Yes ● No

Allow Third Party Selection: ○ Yes ● No

Allow Over Payments: ● Yes ○ No

Auto-Pay Summary Text:

Child Request Message:

Auto Approval Child Requests option allows parent requested changes from the portal to automatically approve. To prevent changes for the child's personal information submitted by guardians through the Connect/Parent Portal from automatically being approved, select No. If a guardians updates their information or a contact's information, it will automatically be approved by the system. An email is sent to the email address setup in the Contact Email section of the General tab for the center for any updates, including child, guardian and contact updates. (Recommended: No)

Allow Days to be Removed controls if guardians can edit a classroom assignment for a child's classroom through the Connect/Parent Portal. (Recommended: No)

Allow Auto-pay controls if a parent is able to setup auto-pay through the Connect/Parent portal. (Recommended: Yes)

Credit Card Removal determines if guardians have the ability to remove a previously setup reoccurring payment method from the auto-pay section in the Connect/Parent Portal. (Recommended: Yes)

Allow Vacation Request controls if guardians have the ability to submit an absent or vacation request through the Connect/Parent Portal. (Recommended: Yes)

Recheck Registration Rules controls if the system checks registration information for children every time the child registers for a classroom. (Recommended: Yes)

Allow Discount Selection allows guardians the option to select a discount through the Connect/Parent Portal. (Recommended: No)

Allow Third Party Selection allows guardians the option to select a third party/sponsor through the Connect/Parent Portal. (Recommended: No)

Allow Over Payments section can allow guardians the ability to pay beyond their current outstanding balance through the Connect Portal.

The **Auto-Pay Summary text** box allows for a custom message to display to parents after a credit card or bank account is setup for a reoccurring payment.

The **Child Request Message** text will display when a guardian submits a request to change a child's personal information.

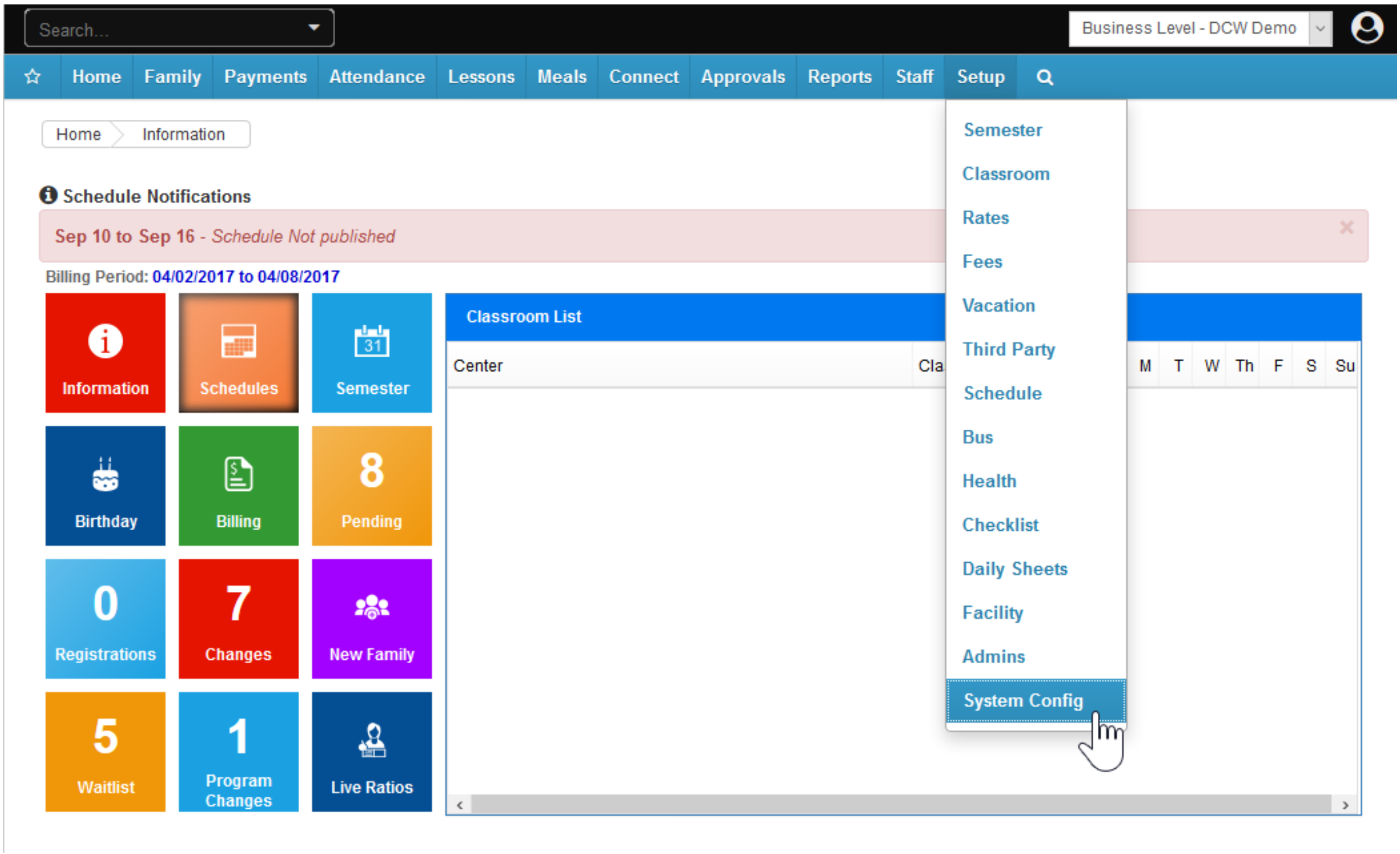
▯Click here to go to the Integration- Gateway/OCN configuration tab!

System Config > General Config, Integration/Gateway OCN

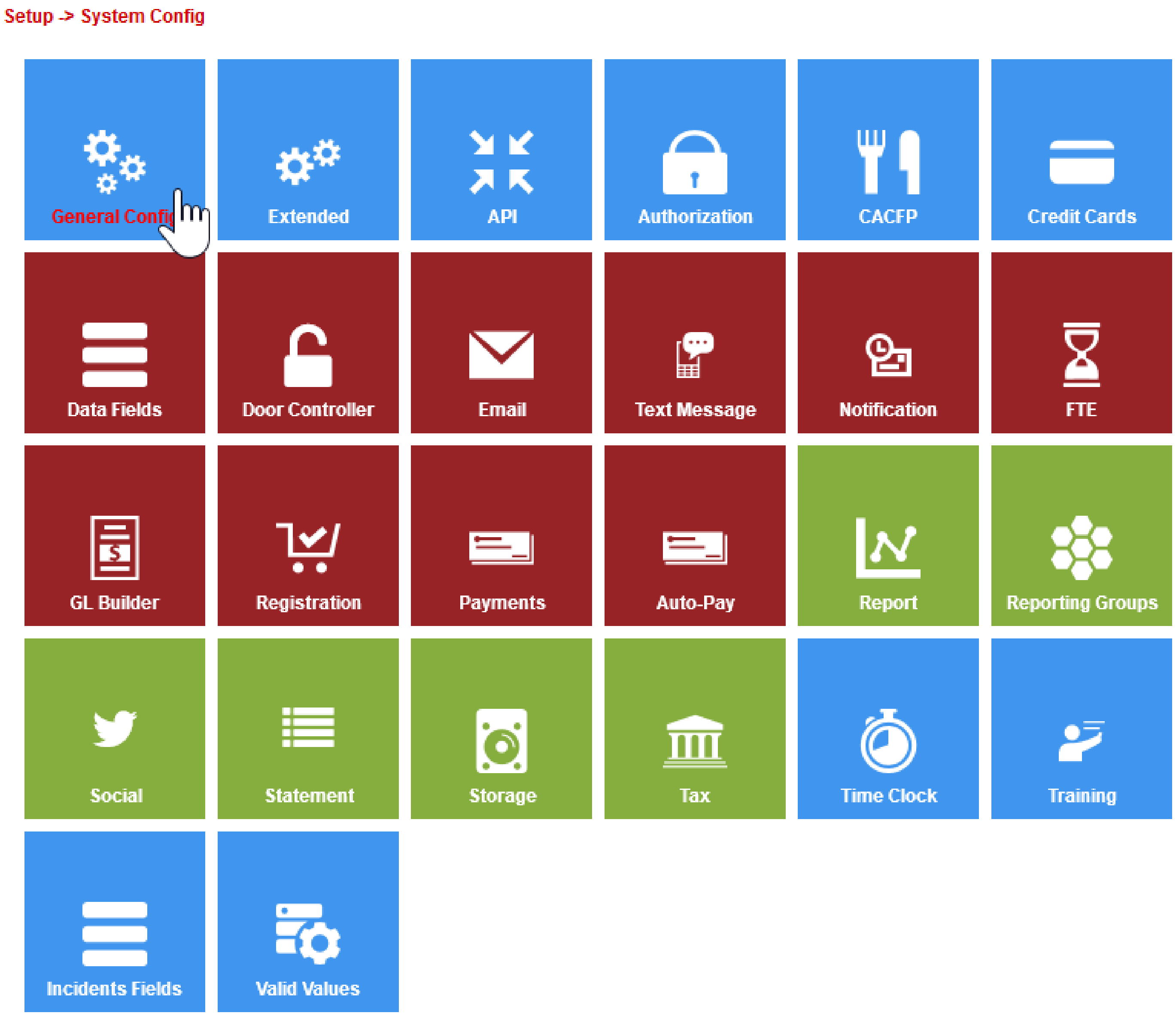
Last Modified on 03/14/2018 9:39 am EDT

Setup > System Config, General Config allows you to set generic settings for your site. This will be the first place you want to visit once you have logged in.

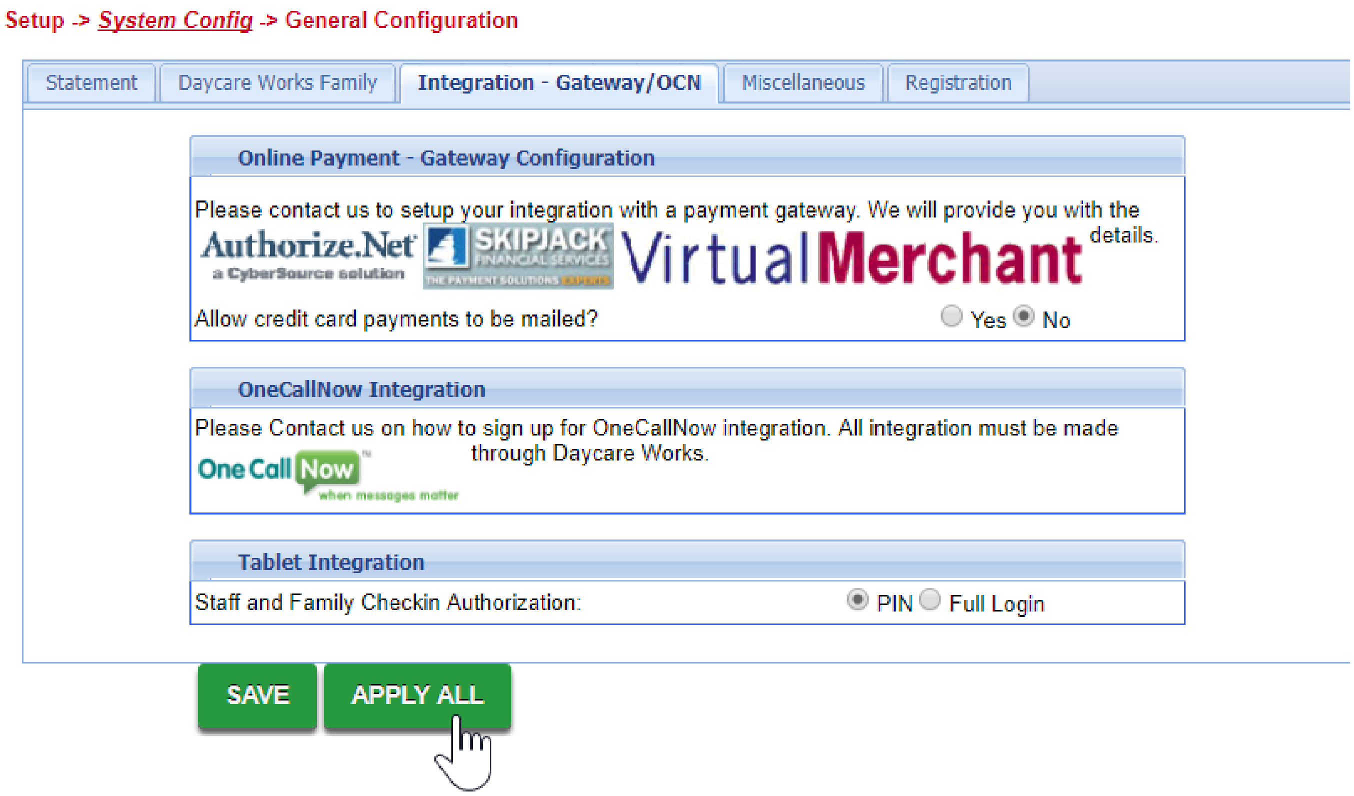
From the Setup menu select the System Config option



Then select the General Config tile



Then select the Integration- Gateway/OCN tab



Online Payment - Gateway Configuration

Please contact us to setup your integration with a payment gateway. We will provide you with the details.

Allow credit card payments to be mailed? ○ Yes ● No

OneCallNow Integration

Please Contact us on how to sign up for OneCallNow integration. All integration must be made through Daycare Works.

Tablet Integration

Staff and Family Checkin Authorization: ● PIN ○ Full Login

Allow credit card payments to be mailed option can allow a credit card form to be displayed on the customer's statement. *(Recommended: No)*

OneCallNow is a phone messaging service that can deliver phone calls or text messages to a large number of families within the center within minutes. Click here to find out more about OneCallNow - if you are interested in setting up this integration please contact your implementation specialist or customer service.

In the Tablet Integrations section either PIN or Full Login can be used for check in. If your site is using the InSite Select application for parent or staff logins, select PIN in the Staff and Family Check in Authorization section. If using older versions of the checkin feature, you have the option of selecting PIN or Full Login to allow parents to sign their children into your Center's touch screen computer using their the portal ID and password. *(Recommended: PIN)*

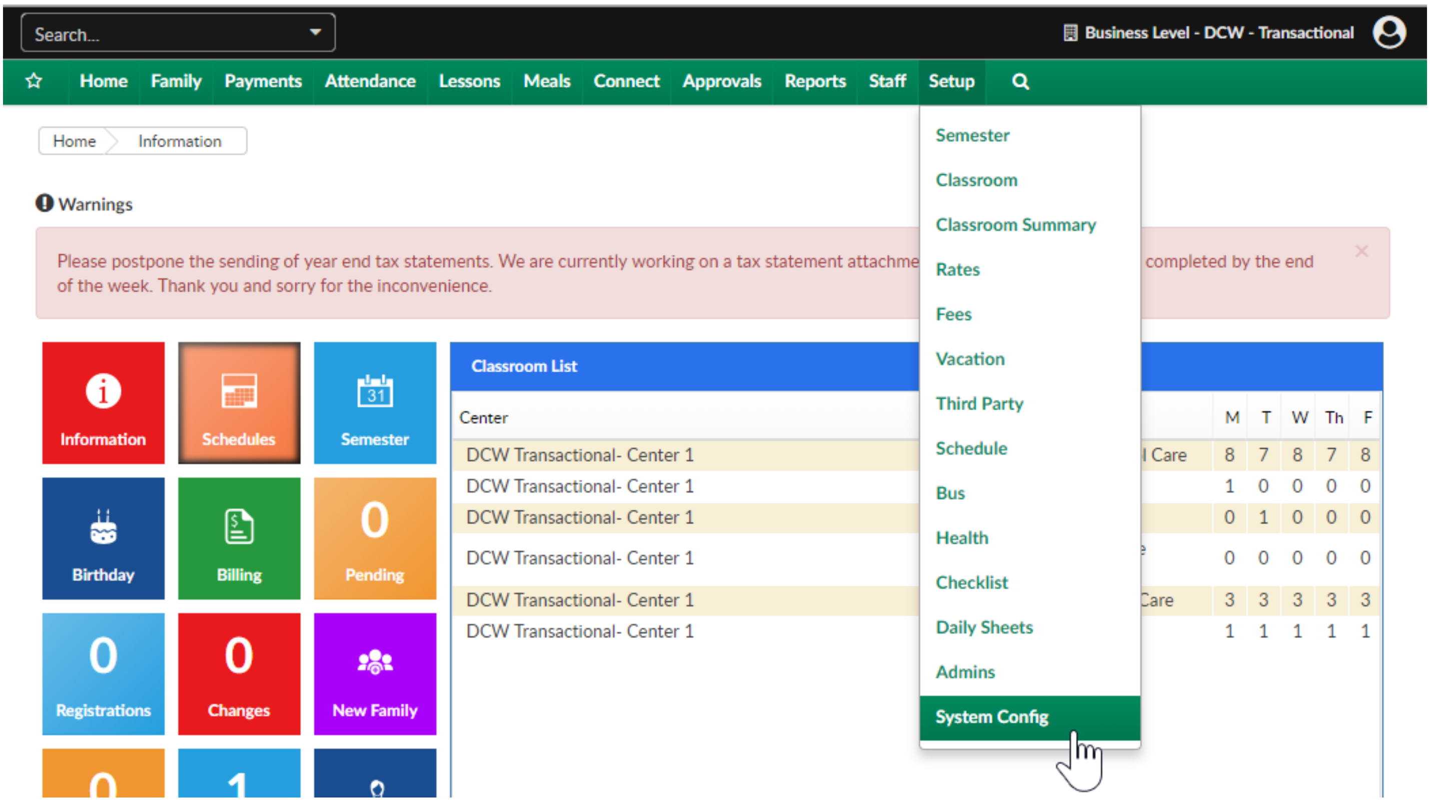
Click Apply All to save settings to all centers.

Click here to see the Miscellaneous General Config settings!

System Config > General Config, Miscellaneous

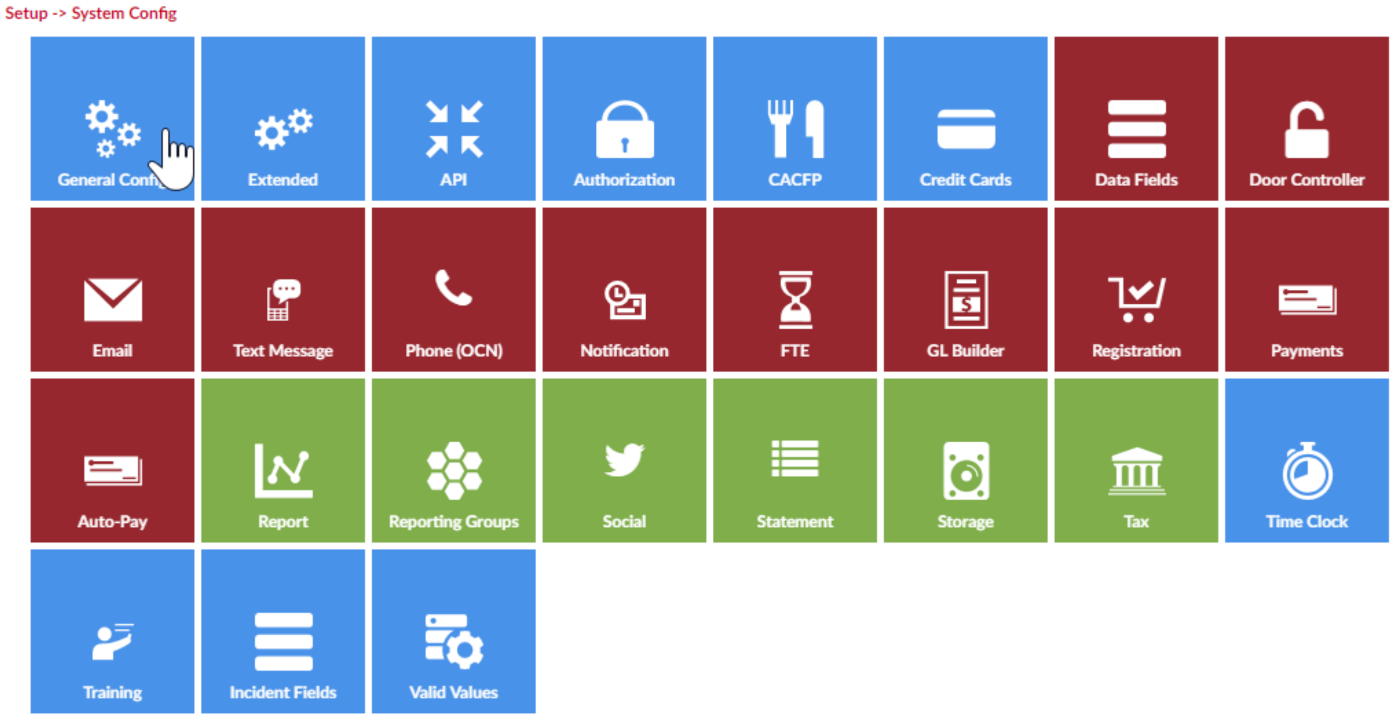
Last Modified on 03/14/2018 9:39 am EDT

From the Setup Menu, select the System Config option.



Please postpone the sending of year end tax statements. We are currently working on a tax statement attachme... completed by the end of the week. Thank you and sorry for the inconvenience.

On the System Conifg screen, select the General Config option.

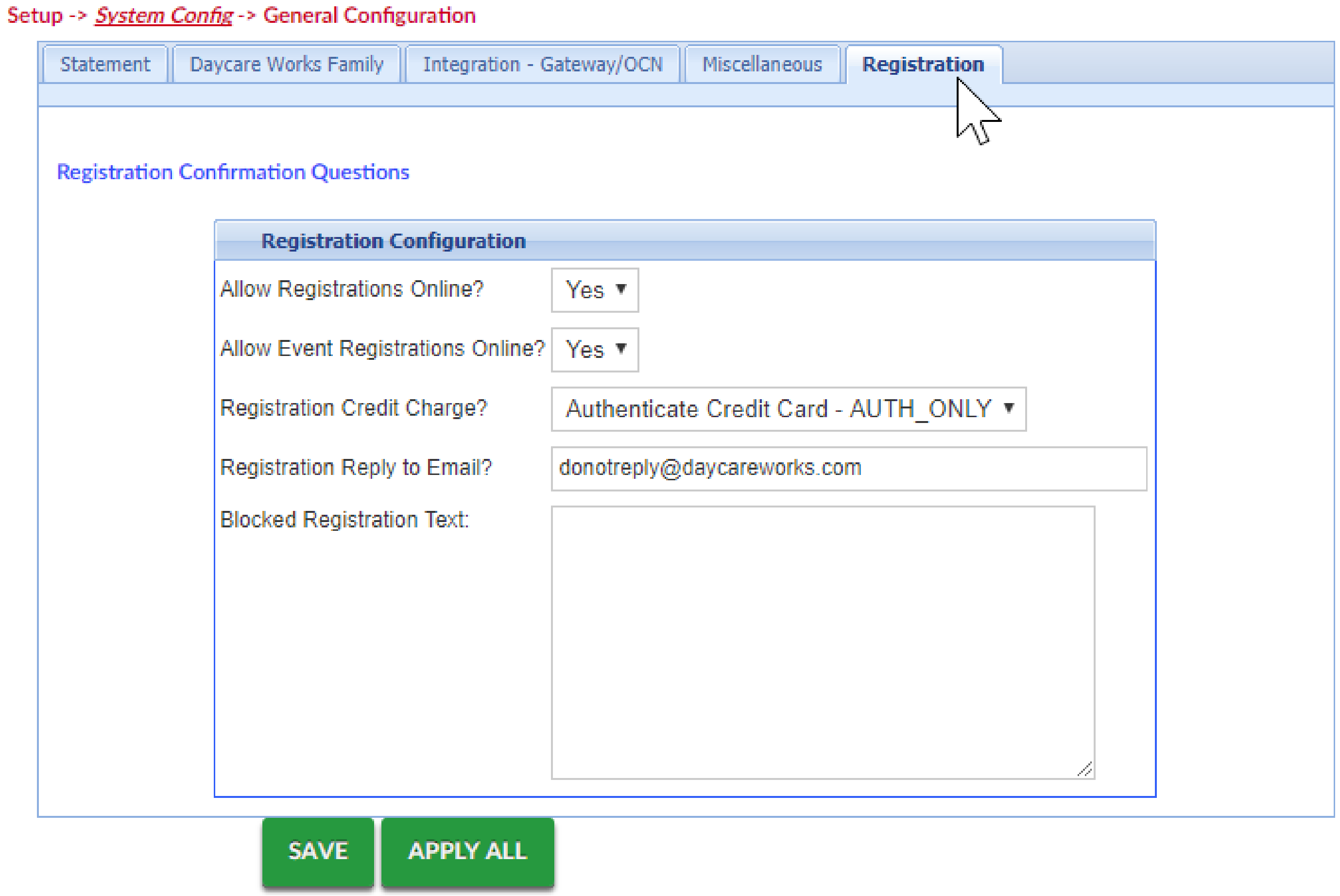


Then select the Registration tab.

- To set business wide Registration Confirmation Questions select the Registration Confirmation Questions link. This will allow a site to have the same Confirmation Questions across their business for ALL of their programs.
- Allow Registrations Online- select YES to allow registrations online, select NO to not allow registrations
- Allow Event Registrations Online- select YES to allow registrations online, select NO to not allow registrations
- Registration Credit Charge This section is only used if your business uses Authorize.net as the payment gateway
    - Select Authenticate Credit Card – Auth_Only in the Registration Credit Charge section to charge the family after the bank has authorized the charge
    - Select Charge when Submitted to charge the family after they have submitted their registration online
    - Select Charge When Approved to charge the family after their online registration has been approved
- Registration Report to Email-Enter the email address that will be responsible for

registration replies in the Registration Reply to Email text box. If a guardian responds to a registration email, this is the email address their email will be sent to.

- Blocked Registration Text- Text that will be sent to families if the registration was blocked (by family, this can be controlled on the family tab or the family record)



Setup -> System Config -> General Configuration

Allow Registrations Online? Yes

Allow Event Registrations Online? Yes

Registration Credit Charge? Authenticate Credit Card - AUTH_ONLY

Registration Reply to Email? donotreply@daycareworks.com

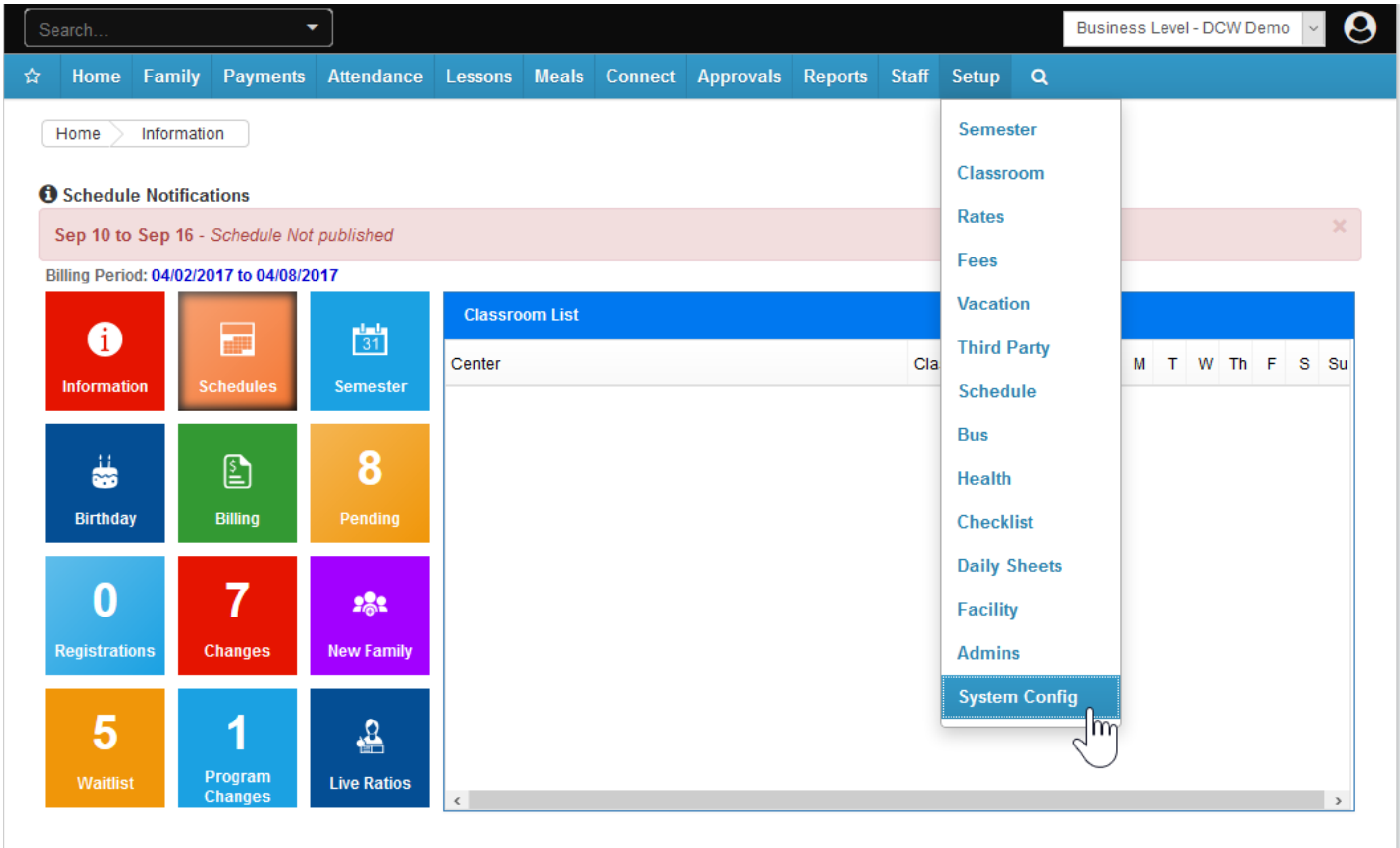
Blocked Registration Text:

System Config > General Config, Registration

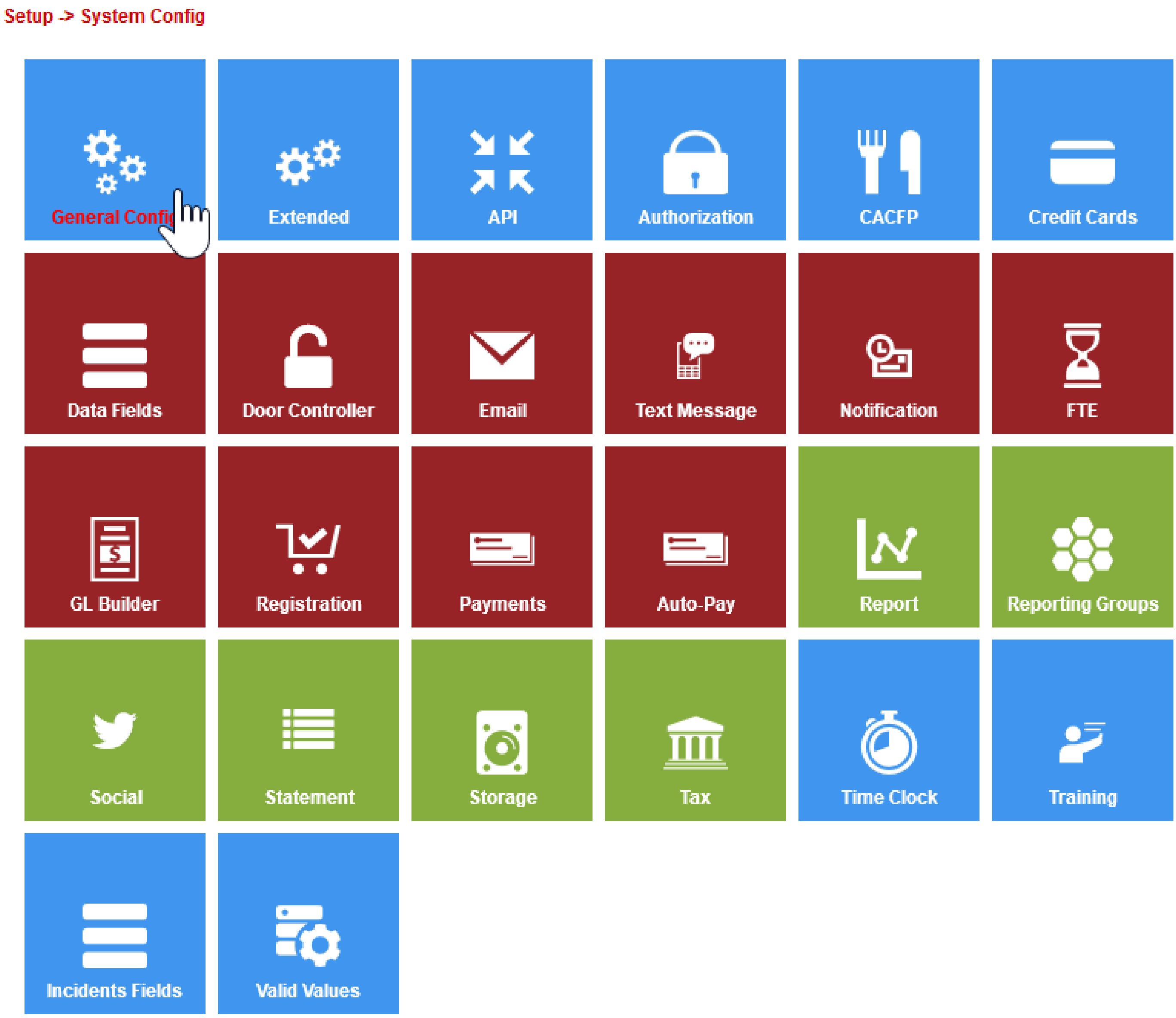
Last Modified on 04/30/2018 7:46 am EDT

Setup > System Config, General Config allows you to set generic settings for your site.

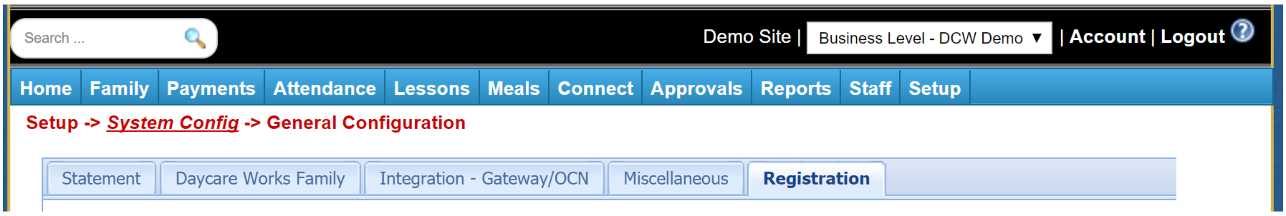
From the Setup menu select the System Config option



Then select the General Config tile

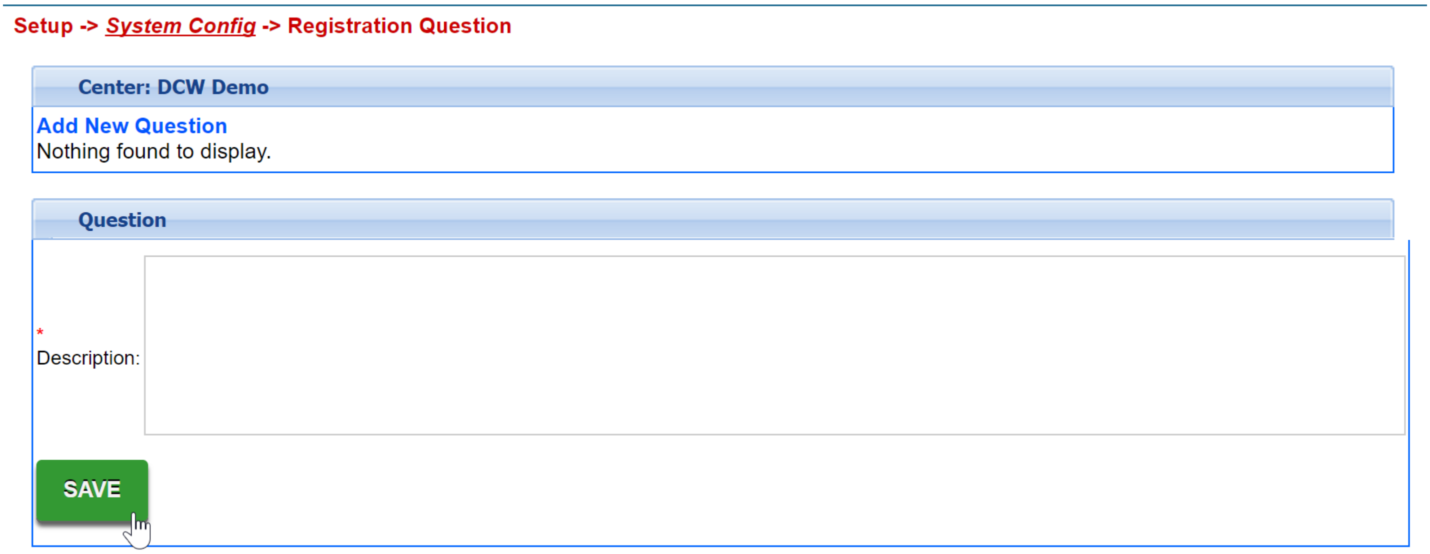


Then select the Registration tab



To set business level wide confirmation questions select the Registration Confirmation Questions link.

Enter the question in the text box and press Save. These Questions will display when a parent is completing registration, the questions should be confirmation type questions- I agree to, I understand etc.


Setup -> System Config -> Registration Question

Center: DCW Demo

Add New Question

Nothing found to display.

Question

* Description:

On the Registration tab, you can also enable basic registration options-

Allow Registration Online if set to yes allows parents to register online in general.

Allow Event Registrations Online if set to yes allows parents to register online for Event type rooms/programs.

Registration Credit Charge allows you to select when credit cards will actually process through to the gateway. NOTE: From the New Registration page when parents register online and pay their card is immediately processed.

☐Click here for even more registration configuration options!

System Config > Extended

Last Modified on 12/19/2018 3:31 pm EST

The Extended Configuration screen allows you to set generic settings for your site. This will be the first place you want to visit once you have logged in.

Navigate to the Extended screen by clicking Setup, then select System Config. Once the Extended tile is selected, the below options will display.

Connect Portal - The Connect Portal section displays items related to the parent portal (family.daycareworks.com or connect.schoolcareworks.com).

1. Allow Connect Portal Login
    - Yes - allow families to have the ability to access the Connect Portal. **Please Note:** This can be changed at a center level if this should be rolled out to individual centers
    - No - families should not have access to the Connect Portal
2. Remove Doctor from Contacts list on Summary Page
    - Yes - remove the student's primary care physician from appearing as a contact for a family
    - No - the student's primary care physician will display as a contact in the Summary tab for the child
3. Validate Student Info On Registration Menu
    - Yes - validate the student's information in the Connect Portal before registration. This will compare the student's personal information to the requirements for the classroom during the registration process
    - No - do not validate the student's information
4. Allow Connect Portal Payment
    - Yes - allow families the ability to make payments via the Connect Portal. **Please Note:** This can be changed at the center level
5. Required Times for Schedule Change Request
    - Yes
    - No
6. Allow Editing Schedule Change Requests via Calendar

    - Yes
    - No
7. Bottom Custom Text on Family Portal Auto-Pay page - DEFINE **Example**: I authorize my payment method to be regularly processed for reoccurring payments
8. Family Portal Auto-Pay Agreement Popup Text - enter custom text that should be displayed on the Auto-pay screen. **Example**: By Agreeing you accept the terms of service. You agree to allow your center to charge your auto-pay account for balances due for current and past due amounts
9. Top Custom Text on Family Portal One-Time Page - enter text that should be displayed at the top of the page for a one-time payment
10. Bottom Custom Text on Family Portal One-Time page - enter text that should be displayed at the bottom of the page for a one-time payment
11. Custom Text on Family Portal Account page - enter text that should display on the Account link. The Account page is where guardians can update their password or security questions
12. Custom Text on Family Portal save/change contact - enter text that should display on the contact page when a contact is saved or changed

Search Features - The Search Features section displays items related to searching for families across multiple centers.

1. Allow Deposit Payer Search Across Center
    - Yes - allow administrators to post payments from a payer across multiple centers
    - No - do not allow payments from a payer across multiple centers
2. Allow Parent Email Search Across Centers
    - Yes - allow administrators to send email to guardians across multiple centers
    - No - do not allow emails to be send across multiple centers
3. Online/POS Payment Search Results Mode

    - Compact scrollable view - only view the search results in a scrollable table
    - Let the user choose - (Recommended) - administrator has the ability to select which criteria will be displayed when searching for transactions
    - Full-page view (HTML) - only display the search results in the HTML format

Reports- This section allows users to enter specific details used by reports to generate results.

1. Age Cutoff Date (Used by Age and Income Analysis Report)- enter the age in date format for cutoff

PIN - The PIN section displays the auto-generation pin settings for individuals within the system.

1. Auto Create PIN
    - Yes - a PIN will automatically be created for each guardian as they are created within the system. This PIN is used to clock in and out of the InSite application
    - No - manually assign a PIN for each guardian
2. Auto Create Contact PIN
    - Yes - a PIN will automatically be created for each contact as they are created within the system. This PIN is used to clock in and out of the InSite application
    - No - manually assign a PIN for each contact

Billing - The Billing section displays settings for running billing within the system.

1. Allow Family Recreate
    - Yes - allow administrators the ability to recreate a family's financial ledger. Recreating will recalculate billing for the family; taking into account any updates to the children's program room assignments, attendance or

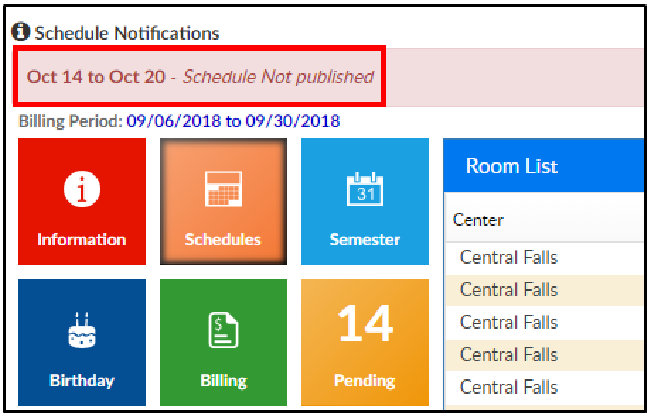
discounts. The Recreate option is only for Defined Billing Periods.
    - No - do not allow administrators to recreate a family's ledger
2. # of Days Before Family Inactive - enter the number of days a family's account will remain active without any classroom assignments for children before the system automatically marks the family as inactive
3. # of Reservations Weeks Per Year - determines the number of weeks a parent is able to have a reservation fee. Reservation fees are charged to families if the child is scheduled to attend, but does not attend. **Please Note:** This process requires additional setup for the Reservation Weeks process
4. Allow Same Week Vacation
    - Yes -
    - No -
5. Apply Event Fee on Manual Assignment (This does not impact registration done via the Connect Portal)
    - Yes - have the system automatically apply a registration fee for any events added to students on the administrator side
    - No - when an administrator enrolls a student into an event, it will not charge the student the registration fee automatically
6. Set Flat Rate Effective Date to First of Month
    - Yes - the system will calculate the monthly rate for the center based on the first of the month. **Please Note**: This is only used for centers that use flat rates, which charge a family one amount for length of the billing period
    - No - do not have the system calculate the monthly rate

Labor/Payroll - The Labor/Payroll section displays the settings for a center's labor and payroll processes.

1. Allow Editing Past Payroll Periods
    - Yes - administrators are able to edit staff attendance after a payroll period is closed
    - No - administrators are not allowed to edit staff attendance after a payroll

period is closed

2. Using Labor Scheduling?
    - Yes
    - No
3. Use Rounded Hours for Attendance?
    - Yes
    - No
4. Track Labor by Attendance Center?
    - Yes
    - No
5. Use Actual Hours (hours and minutes, not fractional)?
    - Yes
    - No
6. Labor Interval (Minutes) - enter the interval used for staff labor scheduling and labor planning
7. Number of Time Periods to Display - enter the number of periods you want to see on the staff scheduling option
8. Number of Hours Before and After Center Hours to Display - enter the number of hours you want to see before or after center hours that are setup on the Home > Hours tab
9. Schedule Not Published Notification - enter custom text that is seen when a schedule is not yet published. This notification is seen on the Home screen


Schedule Notifications

Oct 14 to Oct 20 - *Schedule Not published*

Billing Period: 09/06/2018 to 09/30/2018

Center
Central Falls
Central Falls
Central Falls
Central Falls
Central Falls

10. Schedule In Progress Notification - enter customer text that is seen when a schedule is in the process if being created. This notification is seen on the Home screen

11. Schedule Published Notification - enter custom text that is seen when a schedule is published. This notification is seen on the Home screen
12. Inactive Staff With Published Schedule Notification -
13. Create Schedule Description -
14. Preview Schedule Description -

Statements/Financials - The Statements/Financials section displays the settings for a center's billing statements and financials.

1. Allocation Screen Page Size - enter the total number of allocations that will appear on the allocation screen
2. Allow Agency Refund
    - Yes - the third party agency is able to have a payment refunded
    - No - the third party agencies do now allow for payments to be refunded
3. Allow Holding Accounts
    - Yes - a holding account can be created for a third party agency
    - No - a holding account cannot be created for a third party agency
4. GL Account Separator
    - No Separator - do not use a separator between each General Ledger string
    - Dash (-) - use a dash to separate each individual General Ledger string
    - Period (.) - use a period to separate each individual General Ledger string
5. Payment Allocation Method - determines how the system will automatically allocate out payments to charges on the family's financial ledger
    - First In - allocate payments first to the oldest charge
    - Last In - allocate payments first to the newest charge
6. Allow Statement Split Save Override
    - Yes - administrators are able to edit a split fee and override the original cost. **Please Note**: This override will be removed if the family's financial ledger is recreated
    - No - administrators are not able to edit a split fee and override the original cost

7. Allow Split Parent Due Less Than Copay Amount
    - Yes
    - No
8. Save Prior Period Split Adjustment in Current Period
    - Yes
    - No
9. Display Aging for Outstanding Payments Report
    - Yes - display an aging balance on the Outstanding Payments report
    - No - do not display an aging balance
10. Allocate by Center
    - Yes
    - No
11. Financial Reports - Process Revenue By
    - Family Center
    - Room/Program Center
    - Semi-Room/Program Center
12. Financial Reports - Process Payments By
    - Family Center
    - Room/Program Center
    - Semi-Room/Program Center
13. Financial Reports - Retrieve Data by Post Date
    - Yes
    - No
14. Print Statements by
    - Family - print statements based off of family
    - Guardian - print statements based off of guardian
15. Match Coupon Redemption Code to Coupon Code
    - Yes - require a coupon code be entered when adding a coupon on the family's financial screen
    - No - no coupon redemption code is required

Attendance/Schedule - The Attendance/Schedule section displays settings regarding recording attendance and scheduling children within the system.

1. Use Attendance Journaling
    - Yes - view attendance journal when recording attendance. **Please Note:** This is only used in conjunction with the DCW InSite attendance application
    - No - do not view attendance journal when recording attendance
2. Use Face-to-Name Tracking
    - Yes - create a face-to-name record for a student. **Please Note:** This is used in addition to an attendance record for a student and only works in conjunction with the DCW InSite attendance application
    - No - do not create a face-to-name record
3. Only Display Rooms Active or Pending Semester
    - Yes - when an administrator adds a classroom assignment for a student, the Room drop-down list will only display classrooms with an association to a current or future semester
    - No - show all rooms
4. Only Allow End Date Changes to Schedules
    - Yes - if an administrator attempts to edit a previously created classroom assignment for a student, they will only be able to enter the end date
    - No
5. Allow Schedule Change Request Approval by Date
    - Yes
    - No
6. Require Third Party Contract Attached to Assignment
    - Yes
    - No
7. Send email to parents when wait list is saved on PRA screen
    - Yes
    - No
8. On attendance check-in do auto move (InSite Select)
    1. Yes
    2. No

9. Agency Attendance Integration - Child Authorization # to use
    - Use Third Party Contract > "Child Contract ID #"
    - Use Child Screen > "Accounting ID"
10. Auto Pick Room for Select Check In/Out By Time
    - Yes
    - No

Family- Updates the view of the family tab, enables batch enroll options.

1. Batch Enroll - Allow Mass Enroll for Events Only
    - Yes
    - No

Integration - The Integration section displays the settings for integration with the system and an outside third party software program.

1. Auto Create From SIS
    - Yes - have the system automatically create students from a school's SIS feed if they do not already have an account within the system. **Please Note:** This section requires an SIS integration within the system
    - No - do not have the system automatically create students from a school's SIS
2. Unity Report Time
    - Local Time Zone
    - Eastern Time Zone

Registration- allows you to select when emails will be sent to parents.

1. Send Email to Parent (New Registration)
    - On Confirmation Only

    - On Approval Only
    - On Confirmation and Approval
    - Do Not Send

End of Day

EOD Closed Redirect to Page URL -

Setup

Room Summary Attendance Group Text

Default Prepay Allocations

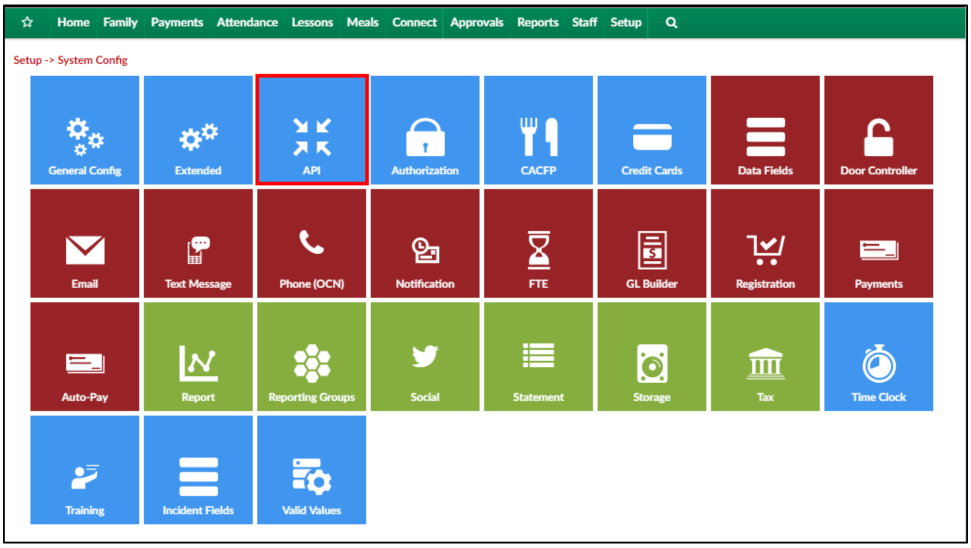
1. Apply As
    - Payment
    - Adjustment
2. Type of Payment -

Setup > System Config, API

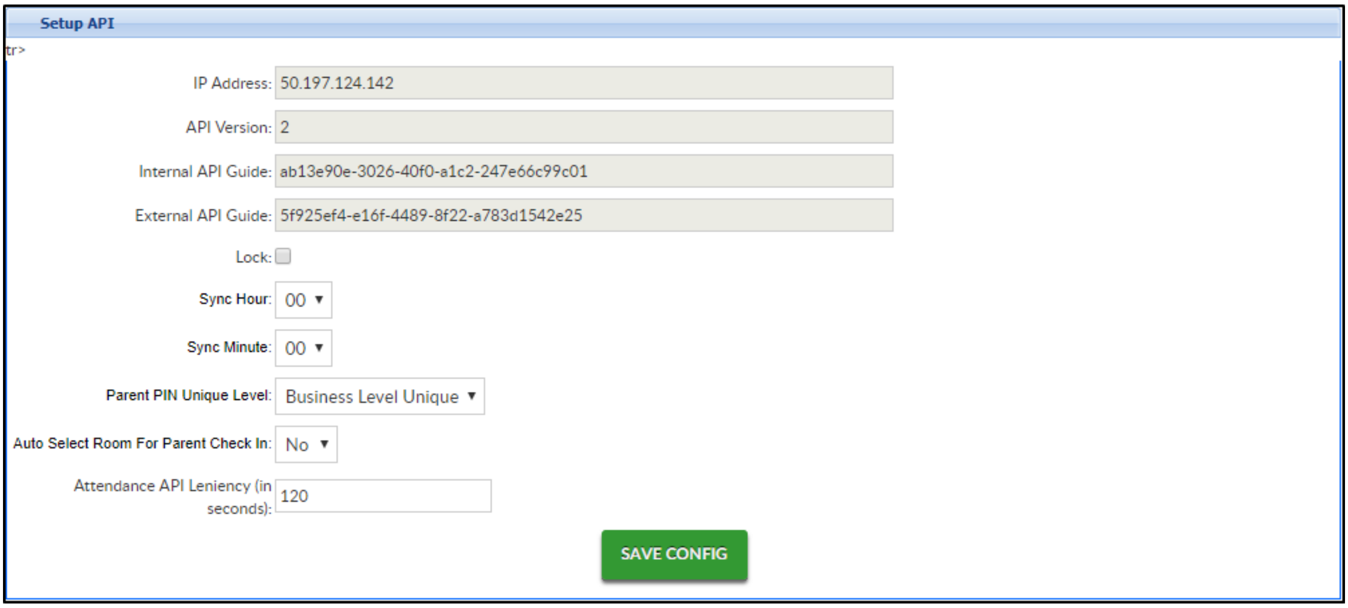
Last Modified on 10/15/2018 9:22 am EDT

The API section of the setup screen will display all devices that are accessing your center's information via the InSite Select or InSite Provider applications.

1. From the Setup menu, select System Config, then select API



2. Setup API shows the device configuration



IP Address: 50.197.124.142

API Version: 2

Internal API Guide: ab13e90e-3026-40f0-a1c2-247e66c99c01

External API Guide: 5f925ef4-e16f-4489-8f22-a783d1542e25

Lock: ☐

Sync Hour: 00

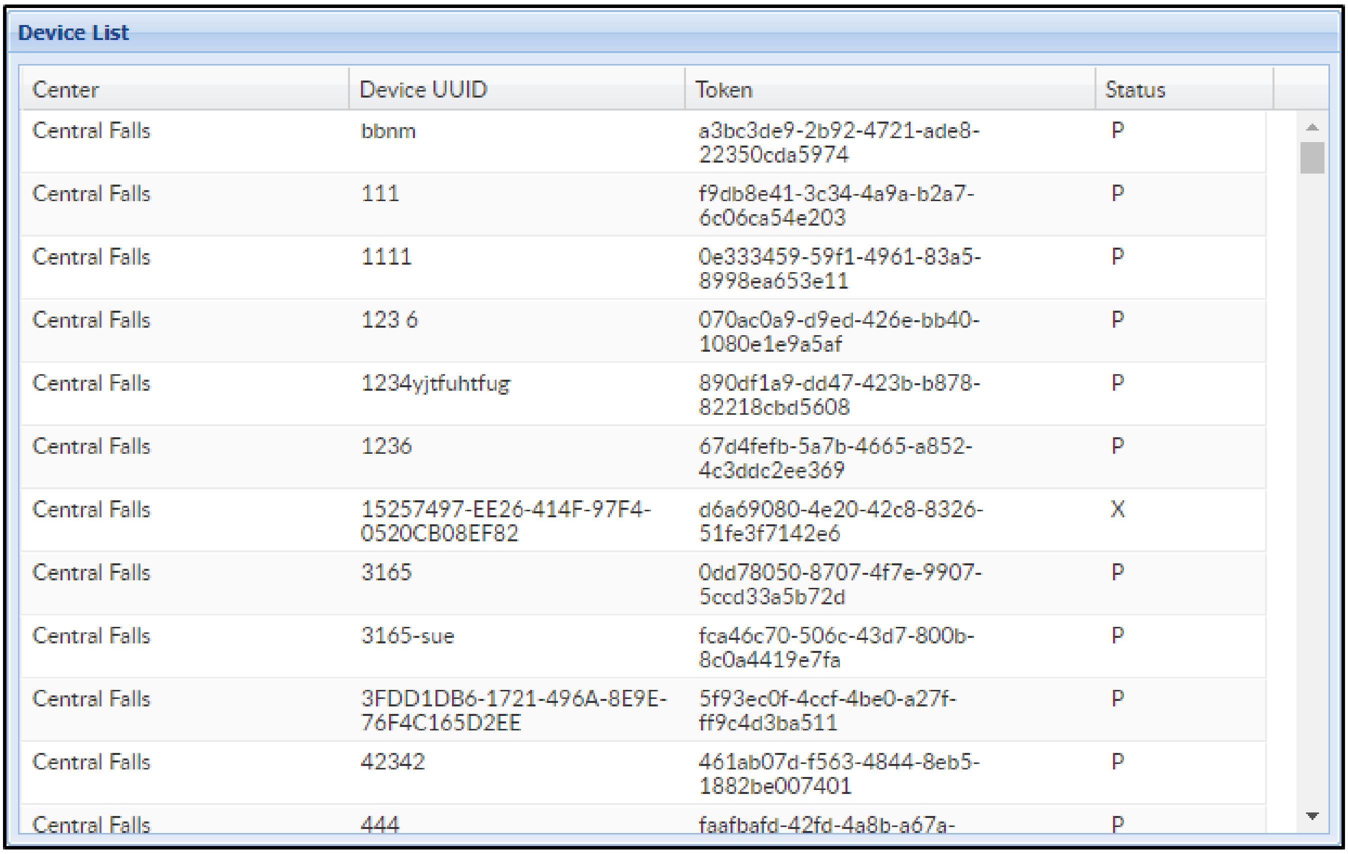
Sync Minute: 00

Parent PIN Unique Level: Business Level Unique

Auto Select Room For Parent Check In: No

Attendance API Leniency (in seconds): 120

3. The Device List section displays all devices using the InSite Select and InSite Provider applications at the centers



Device List

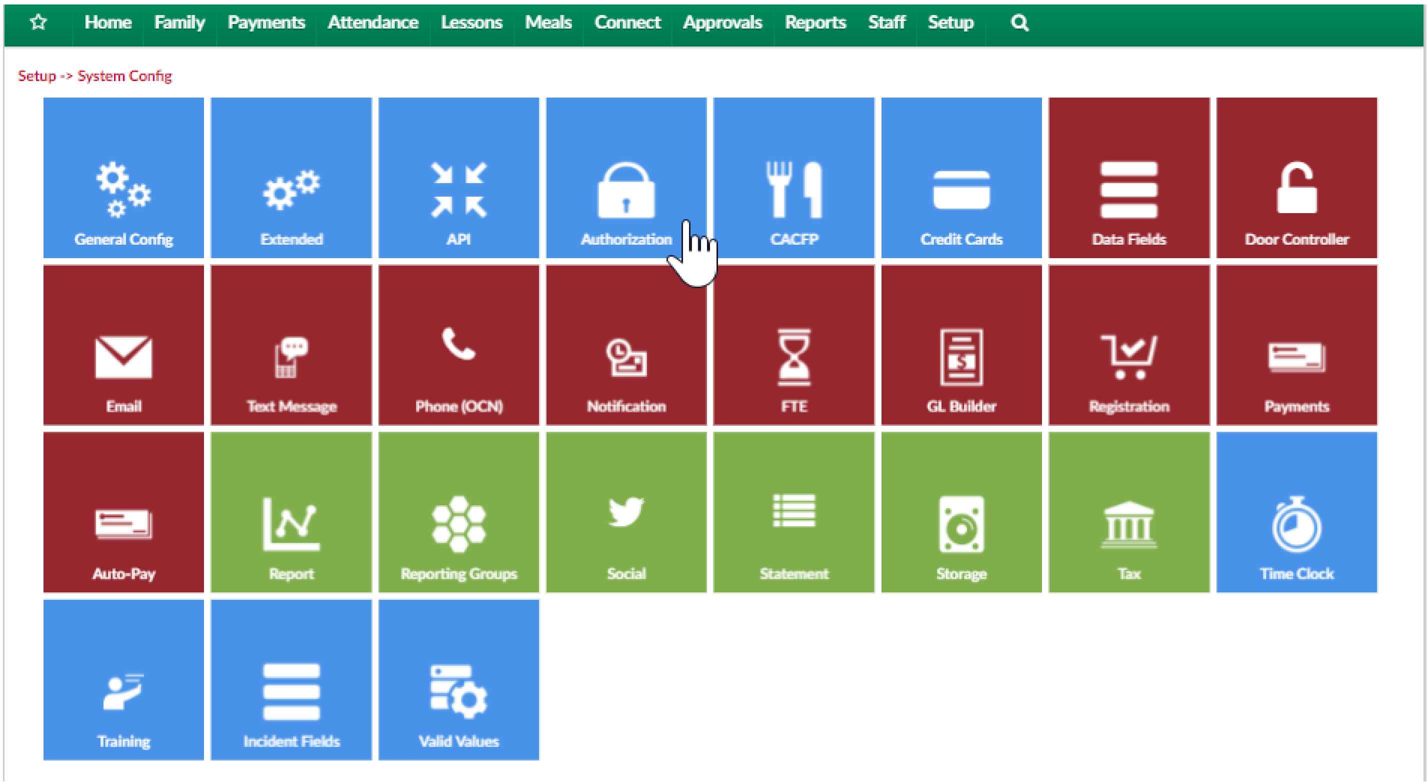
Center	Device UUID	Token	Status
Central Falls	bbnm	a3bc3de9-2b92-4721-ade8-22350cda5974	P
Central Falls	111	f9db8e41-3c34-4a9a-b2a7-6c06ca54e203	P
Central Falls	1111	0e333459-59f1-4961-83a5-8998ea653e11	P
Central Falls	123 6	070ac0a9-d9ed-426e-bb40-1080e1e9a5af	P
Central Falls	1234yjtfuhtfug	890df1a9-dd47-423b-b878-82218cbd5608	P
Central Falls	1236	67d4fefb-5a7b-4665-a852-4c3ddc2ee369	P
Central Falls	15257497-EE26-414F-97F4-0520CB08EF82	d6a69080-4e20-42c8-8326-51fe3f7142e6	X
Central Falls	3165	0dd78050-8707-4f7e-9907-5ccd33a5b72d	P
Central Falls	3165-sue	fca46c70-506c-43d7-800b-8c0a4419e7fa	P
Central Falls	3FDD1DB6-1721-496A-8E9E-76F4C165D2EE	5f93ec0f-4ccf-4be0-a27f-ff9c4d3ba511	P
Central Falls	42342	461ab07d-f563-4844-8eb5-1882be007401	P
Central Falls	444	faafbafd-42fd-4a8b-a67a-	P

Setup > System Config, Authorization

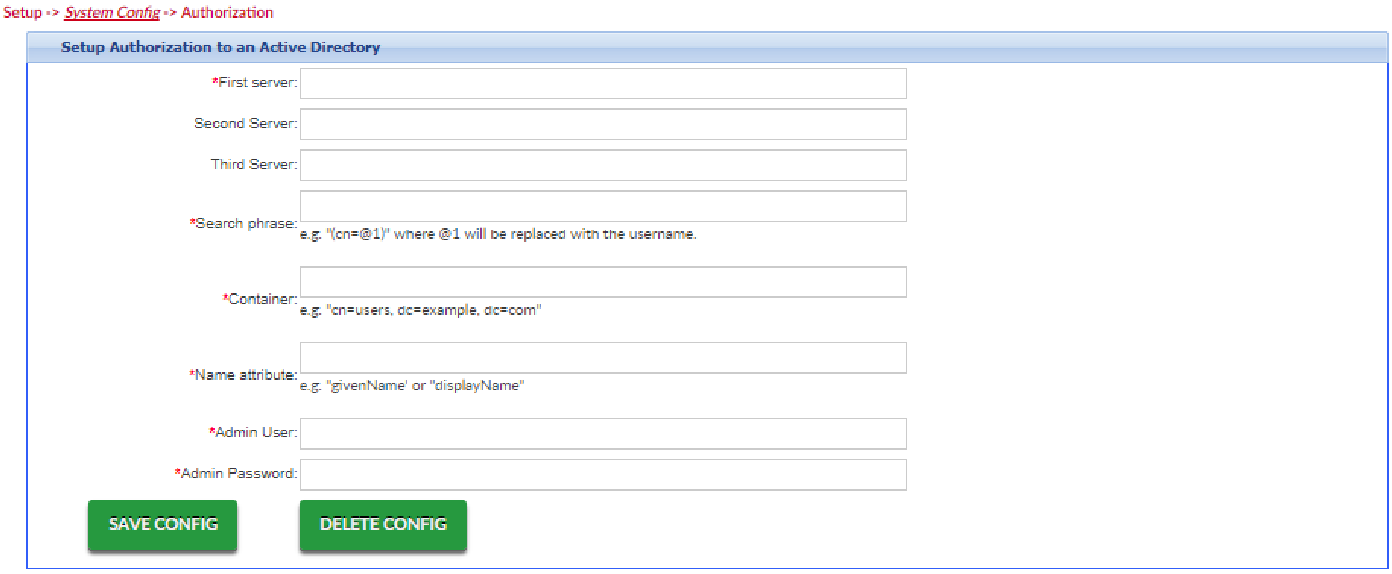
Last Modified on 01/04/2018 11:50 am EST

The Authorizations option will be used if a business is going to integrate with an Active Directory. This information will be how users are able to access the site without a separate login to DayCare Works or SchoolCare Works.

Note: This feature requires additional setup before use, please add a ticket to the Care Portal if your business is interested in setting up this option.



Server and admin information will display on this page to link the system to a site's active directory.



Setup -> *System Config* -> Authorization

Setup Authorization to an Active Directory

*First server:

Second Server:

Third Server:

*Search phrase:
e.g. "(cn=@1)" where @1 will be replaced with the username.

*Container:
e.g. "cn=users, dc=example, dc=com"

*Name attribute:
e.g. "givenName' or "displayName"

*Admin User:

*Admin Password:

Setup > System Config, CACFP

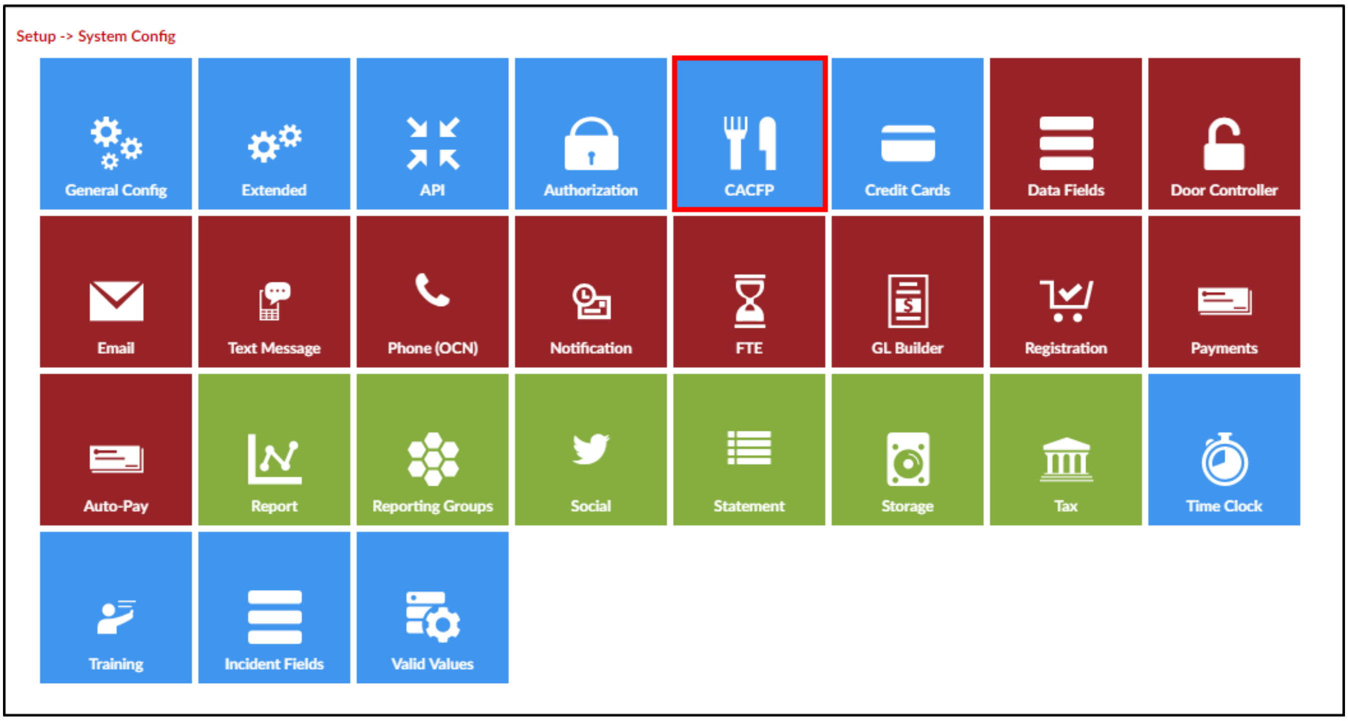
Last Modified on 01/03/2019 9:56 am EST

This article will walk through the different setup screens for CACFP. Click here for general information regarding CACFP.

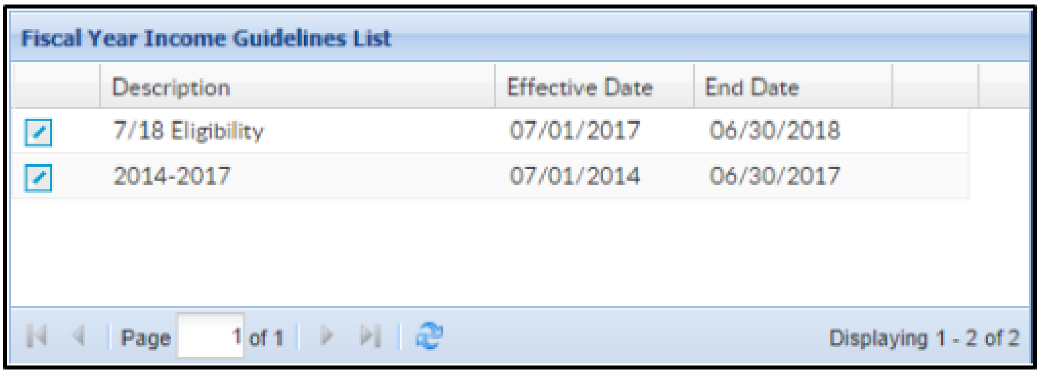
Setup Income Guidelines

Each income year must be added with thresholds for income. This allows families to be classified as Free, Reduced, or Paid on the Children tab in the CACFP/meal section.

1. From the Setup menu, click System Config, then select CACFP



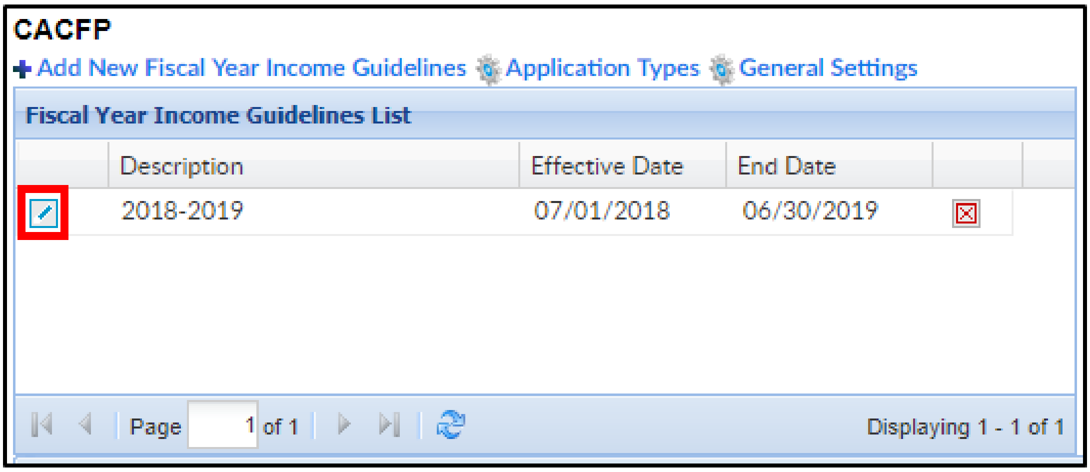
2. The Fiscal Year Income Guidelines List will display all current and previous guidelines



Fiscal Year Income Guidelines List

	Description	Effective Date	End Date
✎	7/18 Eligibility	07/01/2017	06/30/2018
✎	2014-2017	07/01/2014	06/30/2017

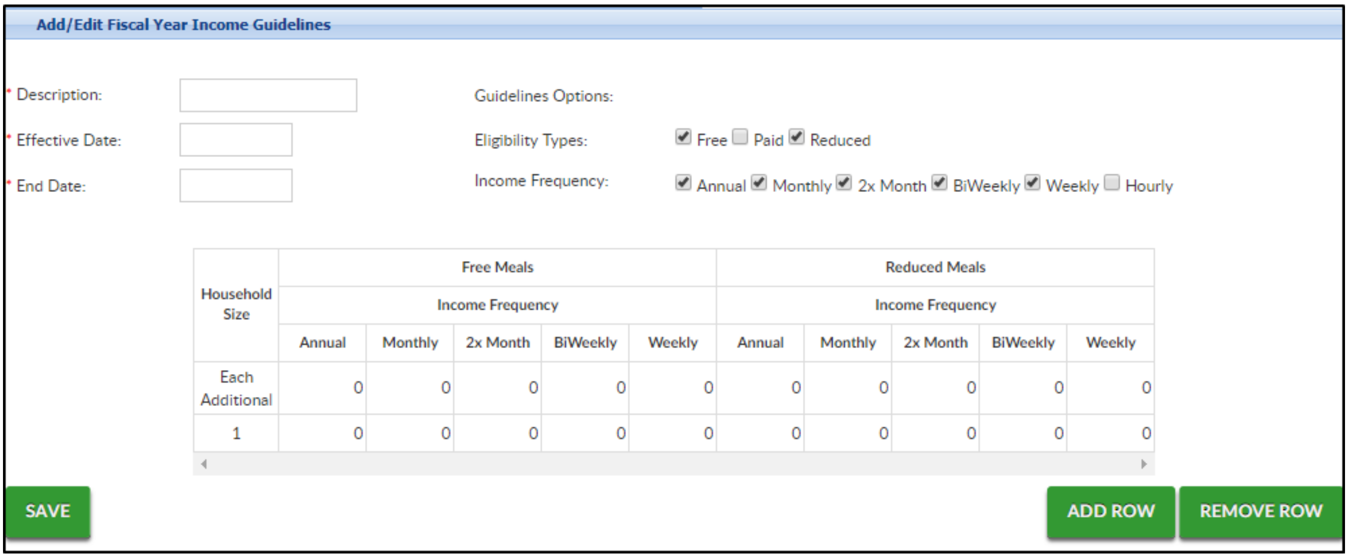
3. To update current guidelines, click the edit icon to the left of the Description



Fiscal Year Income Guidelines List

	Description	Effective Date	End Date	
	2018-2019	07/01/2018	06/30/2019	☒

4. To create new guidelines, navigate to the Add/Edit Fiscal Year Income Guidelines section



Add/Edit Fiscal Year Income Guidelines

* Description:
* Effective Date:
* End Date:

Guidelines Options:
Eligibility Types: ☑ Free ☐ Paid ☑ Reduced
Income Frequency: ☑ Annual ☑ Monthly ☑ 2x Month ☑ BiWeekly ☑ Weekly ☐ Hourly

Household Size	Free Meals					Reduced Meals				
	Income Frequency					Income Frequency				
	Annual	Monthly	2x Month	BiWeekly	Weekly	Annual	Monthly	2x Month	BiWeekly	Weekly
Each Additional	0	0	0	0	0	0	0	0	0	0
1	0	0	0	0	0	0	0	0	0	0

5. Description - enter a name for the CACFP period. This description should include the year range for the program
6. Effective Date/End Date - enter the start and end dates for the period.

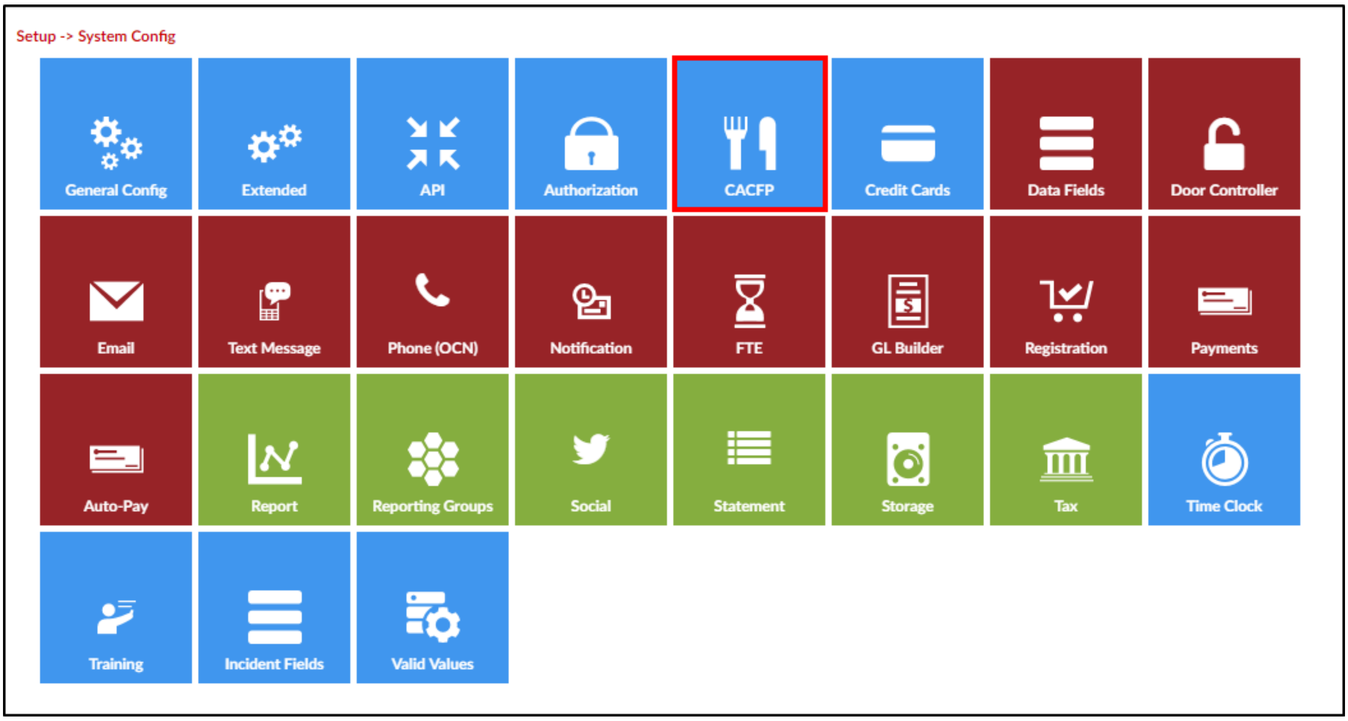
   Please Note: The effective dates are always July 1-June 30 each year
7. Eligibility Types - these are the types of meals that will be recorded for the income portion of the CACFP year
   - Free - students do not pay for meals
   - Paid - students pay full price for meals
   - Reduced - students pay a reduced cost for the meals
8. Income Frequency - select the frequencies that should display on the income chart
9. In the Income Chart, enter the income guidelines for a family of 1 for Free and Reduced Meals, these numbers are based on the CACFP guidelines

10. Enter the income guidelines for each additional family member for Free and Reduced Meals in the Each Additional row
11. Click Add or Remove Row to add more rows or remove a row
12. Click Save

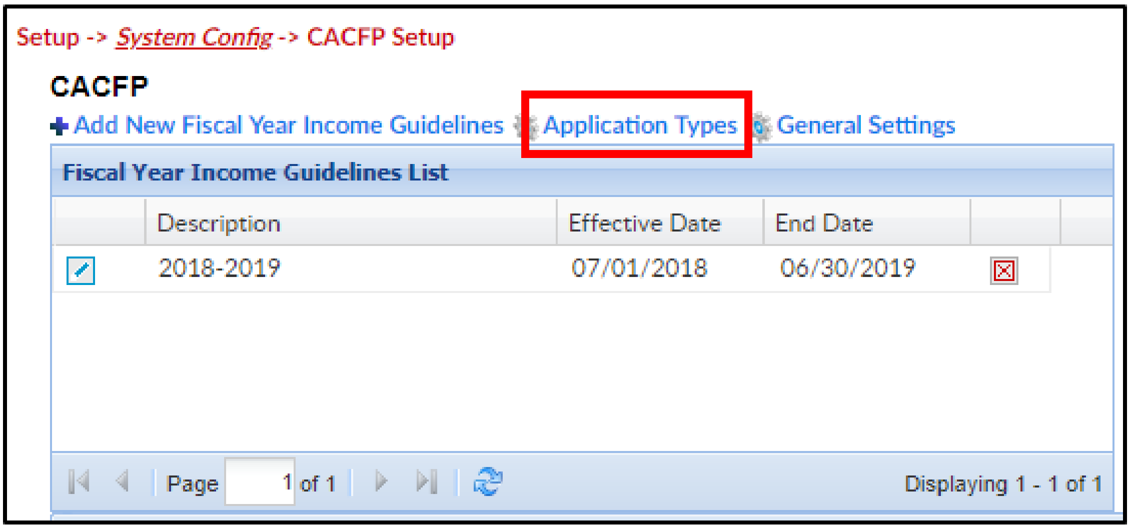
Setup - Application Types

Application Types allow users to track if a student is free, paid, or reduced. There is also a calculate option to have the system calculate a student's status.

1. From the Setup menu, click System Config, then select CACFP



2. The Fiscal Year Income Guidelines List will display all current and previous guidelines. Click Application Types



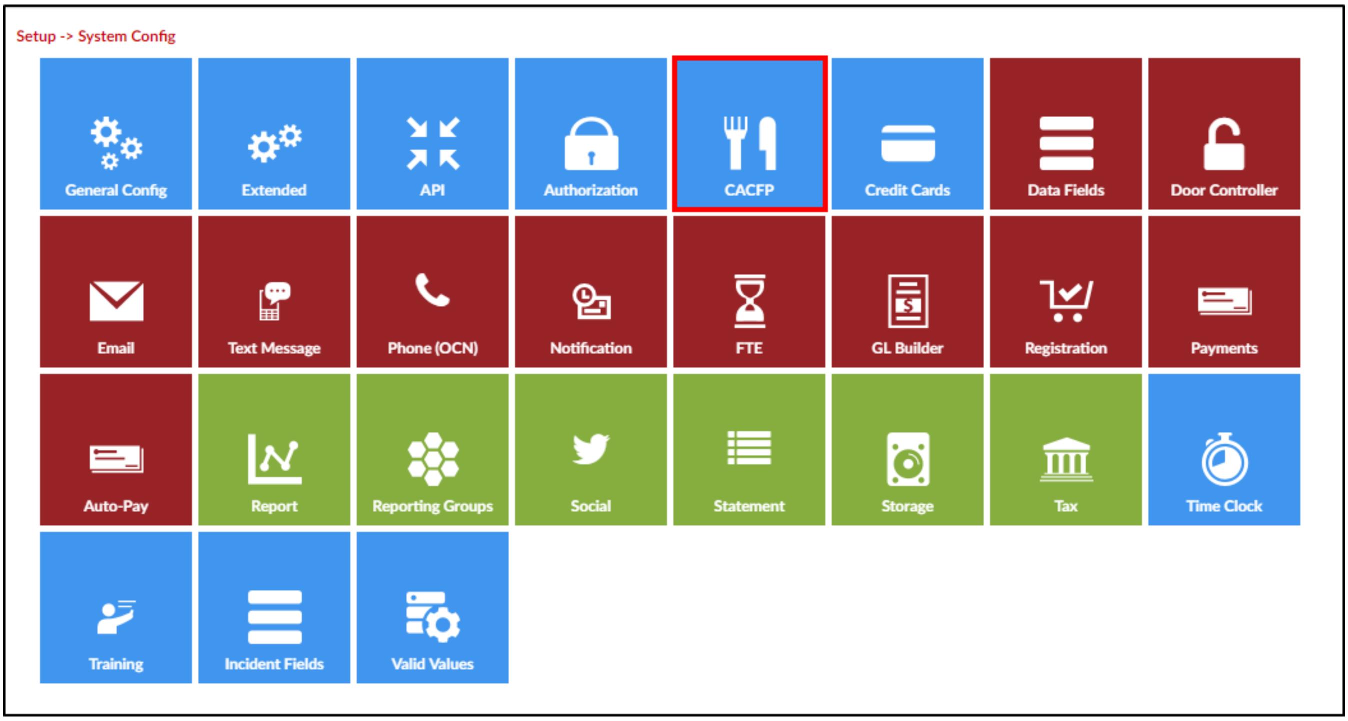
Fiscal Year Income Guidelines List

	Description	Effective Date	End Date	
	2018-2019	07/01/2018	06/30/2019	☒

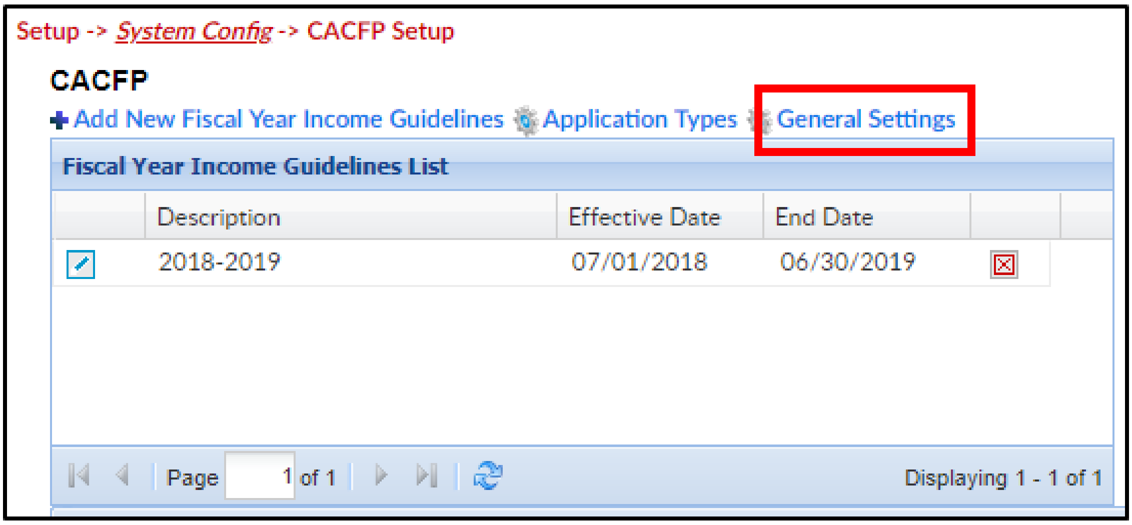
3. The CACFP Application Types List will display all current application types
4. In the Add/Edit CACFP Application Type section, enter a Field Label. The Field Label should be Free, Reduced, Paid, or Calculated
5. Eligibility Type - choose from the drop-down menu
6. Region - select the region the application relates to, if applicable or select All
7. Requires Agency Docs
    - Yes - this application type requires documentation from an agency
    - No - this application type does not require documentation
8. Requires Code Entry
    - Yes - this application type requires code entry
    - No - this application type does not require code entry
9. Click Save
10. Continue this process until all application types have been added into the system

Setup - General Settings

1. From the Setup menu, click System Config, then select CACFP



2. The Fiscal Year Income Guidelines List will display all current and previous guidelines. Click General Settings



	Description	Effective Date	End Date	
	2018-2019	07/01/2018	06/30/2019	

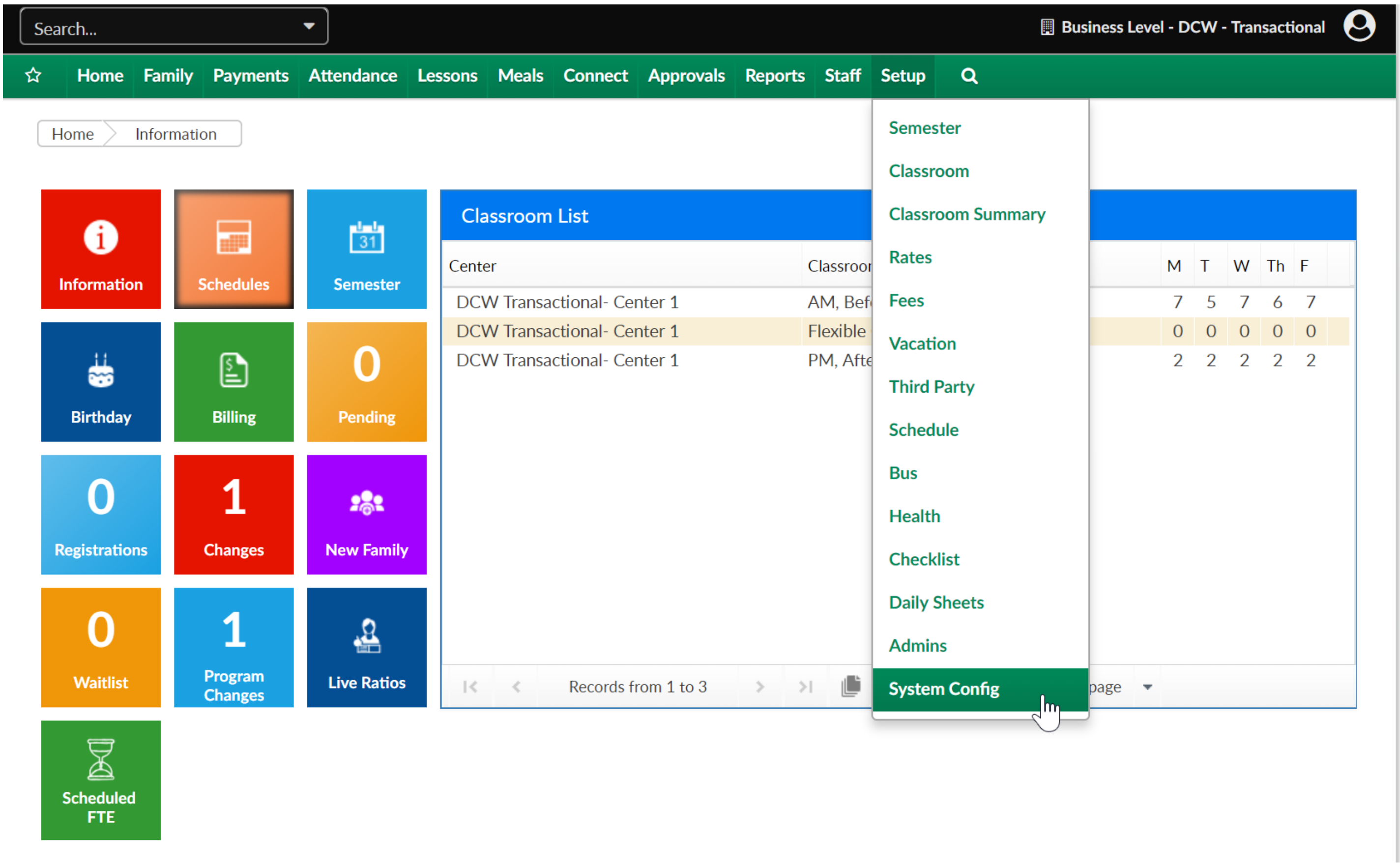
3. Display "At Risk" Type - click here for more information on At Risk
    - Yes - the center or business is serving an "At Risk" community
    - No - the center or business is not serving an "At Risk" community

Setup > System Config, Credit Cards

Last Modified on 04/03/2018 10:15 am EDT

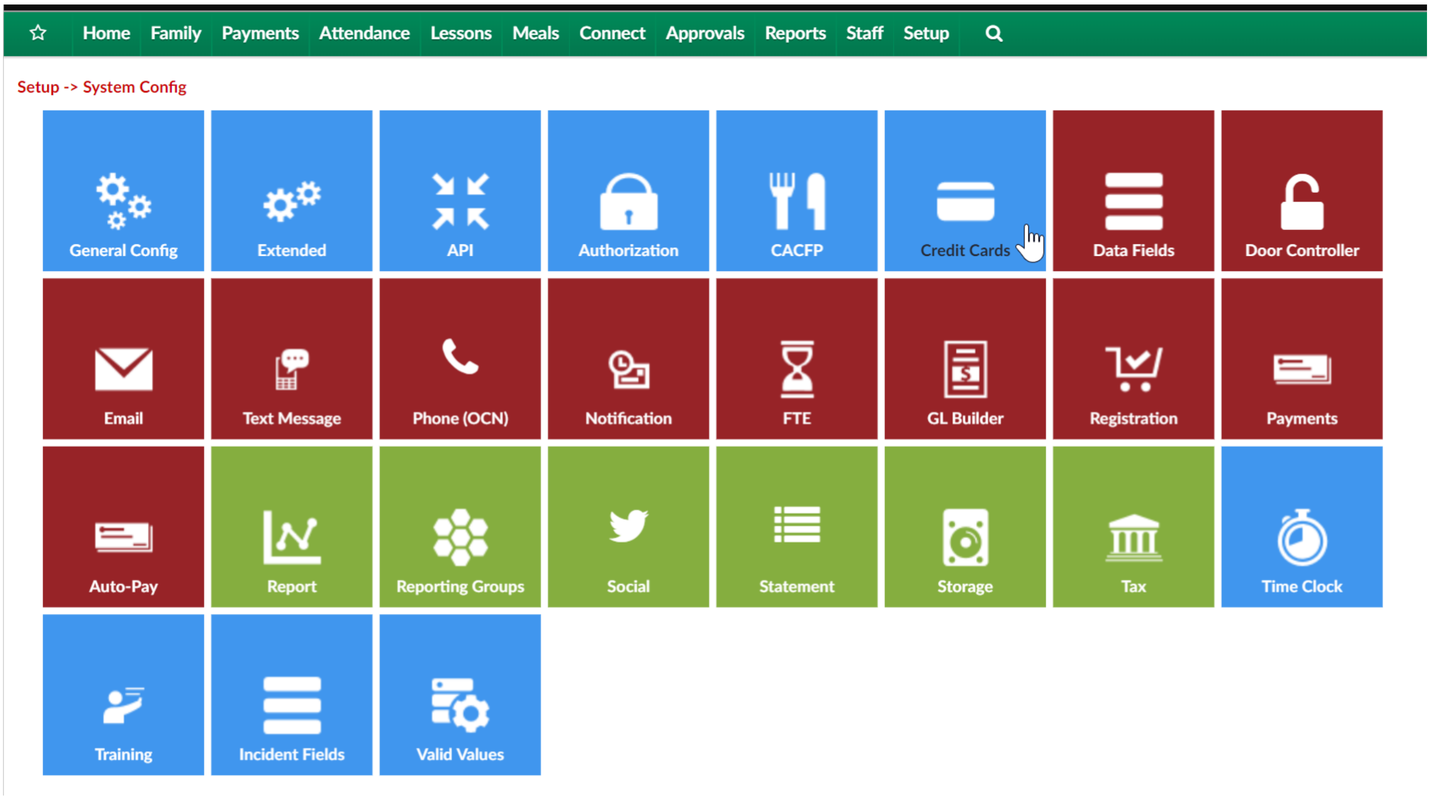
The credit card section allows for a site to select the type of cards sites/centers are allowed to process.

From the Setup menu, select System Config.

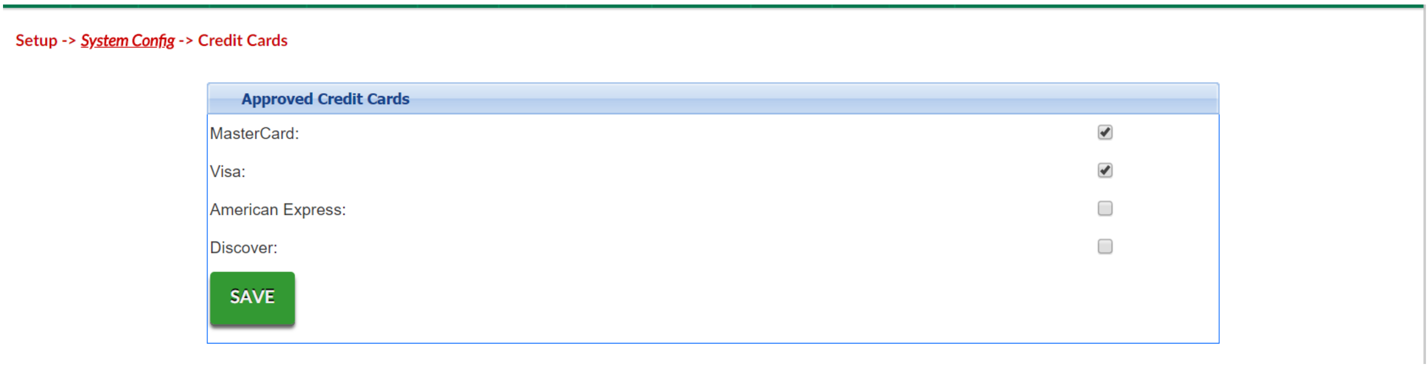


Center	Classroo	M	T	W	Th	F
DCW Transactional- Center 1	AM, Bef	7	5	7	6	7
DCW Transactional- Center 1	Flexible	0	0	0	0	0
DCW Transactional- Center 1	PM, Afte	2	2	2	2	2

Then select Credit Cards-



Select the checkboxes for the card types your center will be accepting. If no card types are selected processing will not be an option.


Setup -> *System Config* -> Credit Cards

Approved Credit Cards

MasterCard: ☑

Visa: ☑

American Express: ☐

Discover: ☐

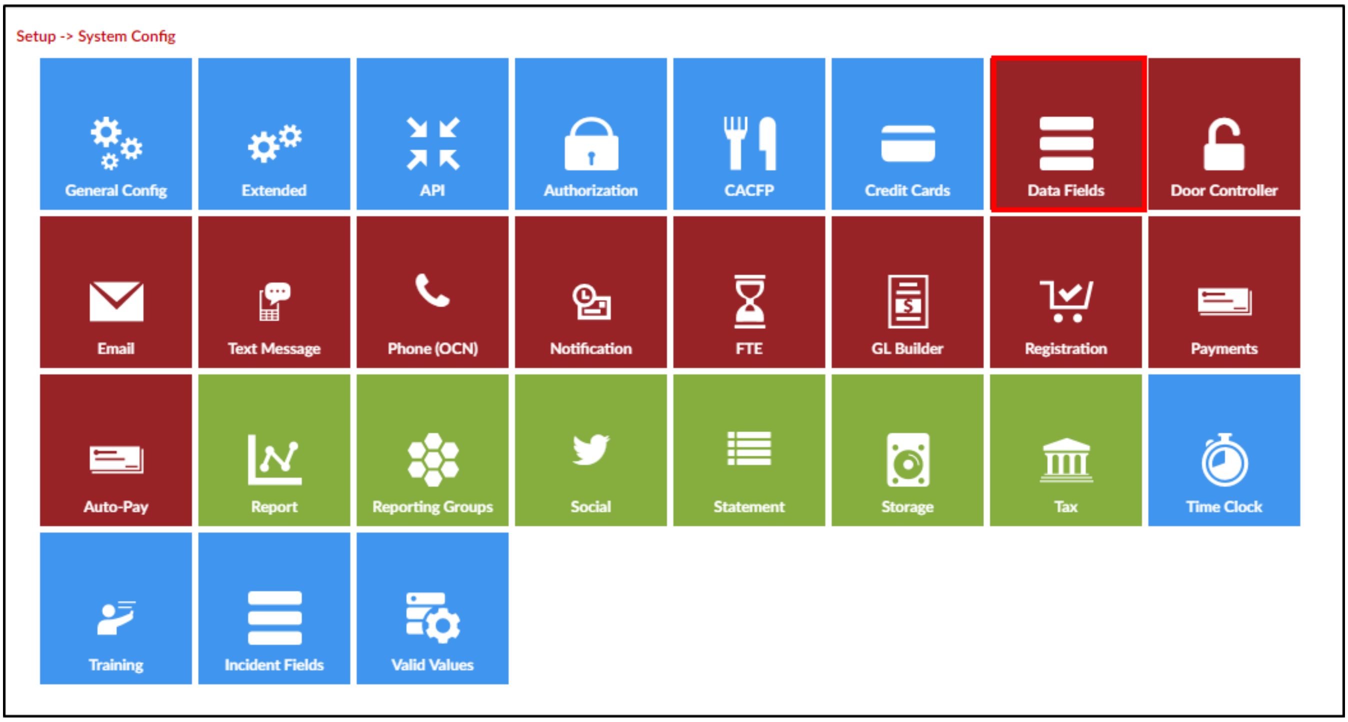
System Config > Data Fields

Last Modified on 12/04/2018 11:05 am EST

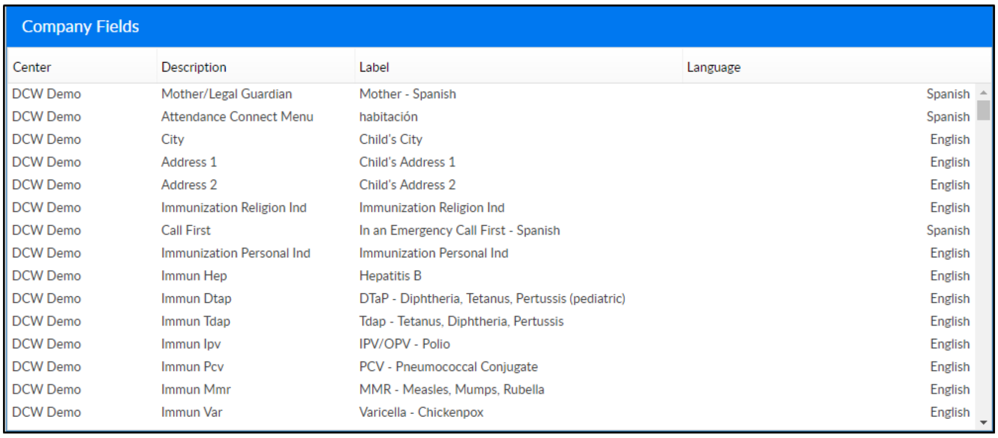
The Data Fields screen assists with customizing the center's registration screen.

---

1. From the Setup menu, click System Config, then select Data Fields



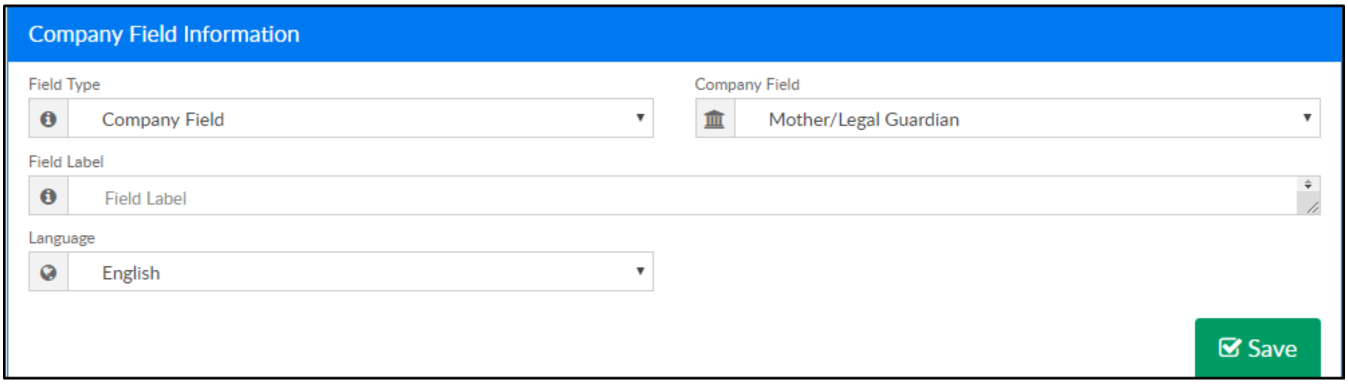
2. The Company Fields section displays all current fields in the system



Company Fields

Center	Description	Label	Language
DCW Demo	Mother/Legal Guardian	Mother - Spanish	Spanish
DCW Demo	Attendance Connect Menu	habitación	Spanish
DCW Demo	City	Child's City	English
DCW Demo	Address 1	Child's Address 1	English
DCW Demo	Address 2	Child's Address 2	English
DCW Demo	Immunization Religion Ind	Immunization Religion Ind	English
DCW Demo	Call First	In an Emergency Call First - Spanish	Spanish
DCW Demo	Immunization Personal Ind	Immunization Personal Ind	English
DCW Demo	Immun Hep	Hepatitis B	English
DCW Demo	Immun Dtap	DTaP - Diphtheria, Tetanus, Pertussis (pediatric)	English
DCW Demo	Immun Tdap	Tdap - Tetanus, Diphtheria, Pertussis	English
DCW Demo	Immun Ipv	IPV/OPV - Polio	English
DCW Demo	Immun Pcv	PCV - Pneumococcal Conjugate	English
DCW Demo	Immun Mmr	MMR - Measles, Mumps, Rubella	English
DCW Demo	Immun Var	Varicella - Chickenpox	English

3. Complete the Company Field Information section to create a new custom field


Company Field Information

Field Type: Company Field

Company Field: Mother/Legal Guardian

Field Label: Field Label

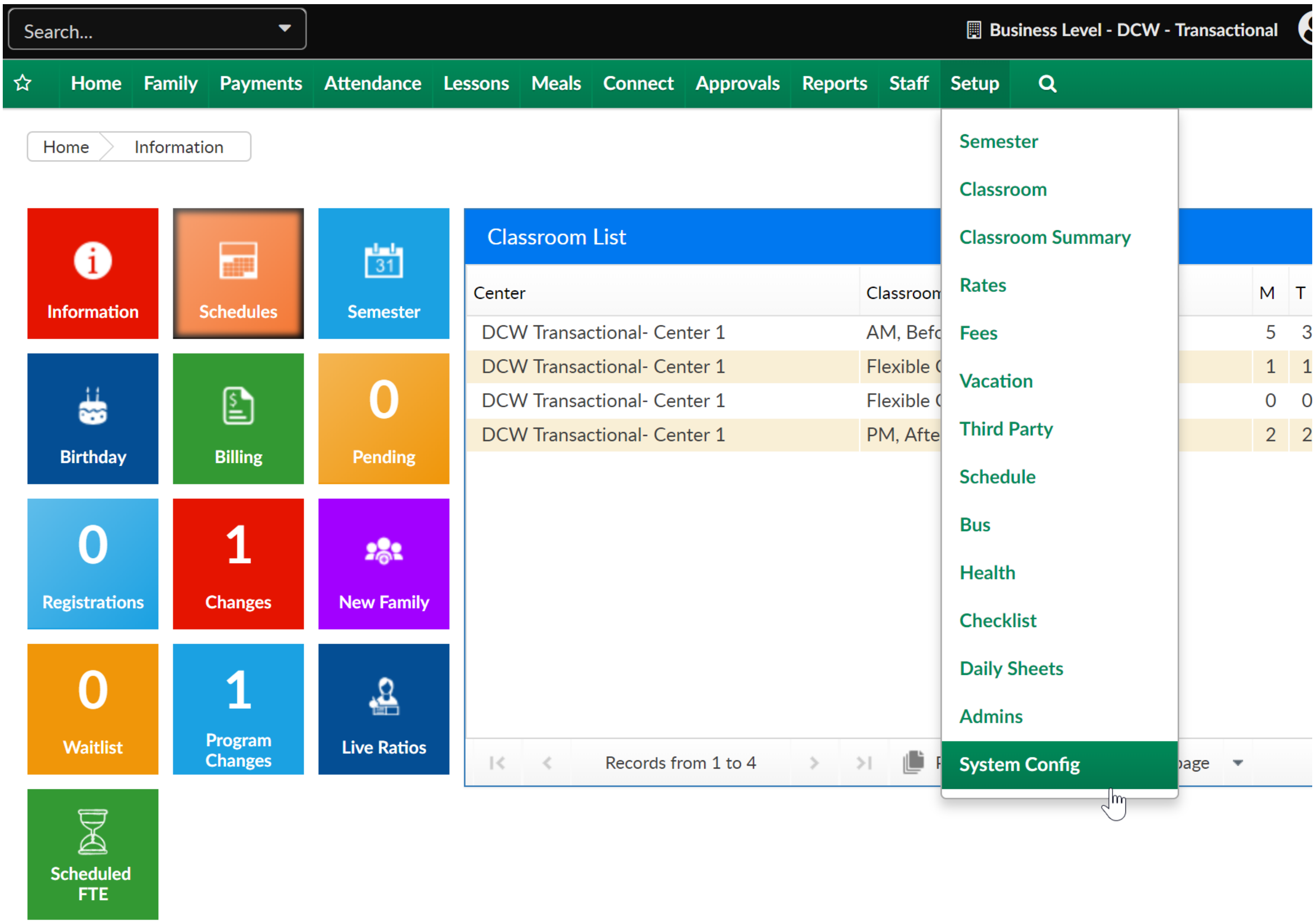
Language: English

4. Field Type - must be set to Company Field
5. Company Field - choose a field to relabel, these fields will typically be general and registration fields
6. Field Label - enter the label you wish to see displayed
7. Language - select the language
8. Click Save

System Config > Door Controller

Last Modified on 05/18/2018 1:43 pm EDT

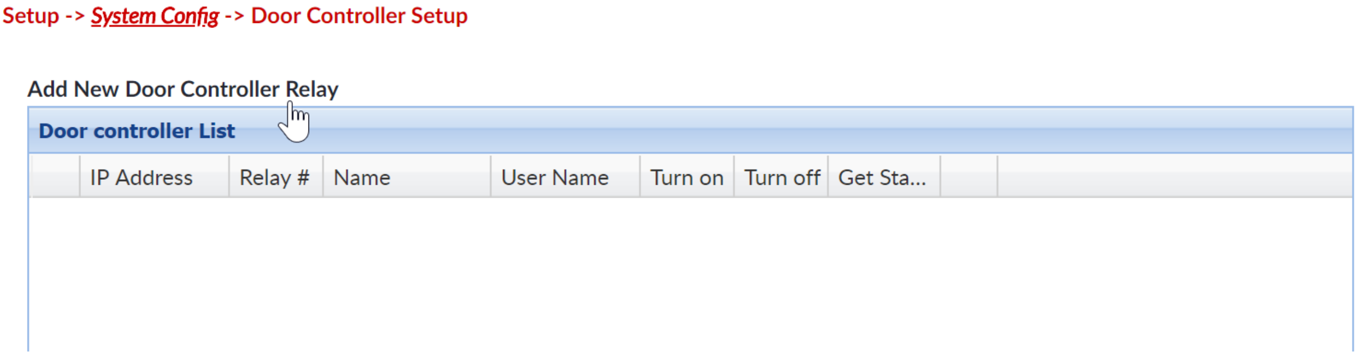
From the Setup menu, select System Config



Center	Classroon	M	T
DCW Transactional- Center 1	AM, Befc	5	3
DCW Transactional- Center 1	Flexible (	1	1
DCW Transactional- Center 1	Flexible (	0	0
DCW Transactional- Center 1	PM, Afte	2	2

Then select the Door Controller tile-

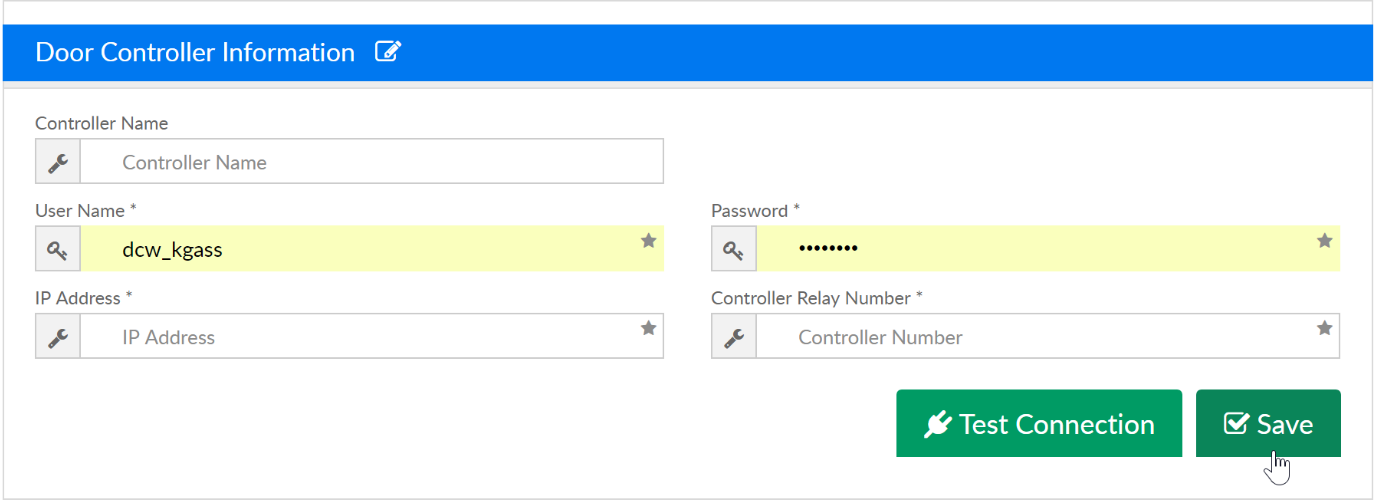
Select the Add New Door Controller Relay link-



	IP Address	Relay #	Name	User Name	Turn on	Turn off	Get Sta...	

Enter Door Controller detail, then press Save-

Setup -> *System Config* -> Door Controller Setup -> New Door Controller


Door Controller Information

Controller Name: Controller Name

User Name *: dcw_kgass

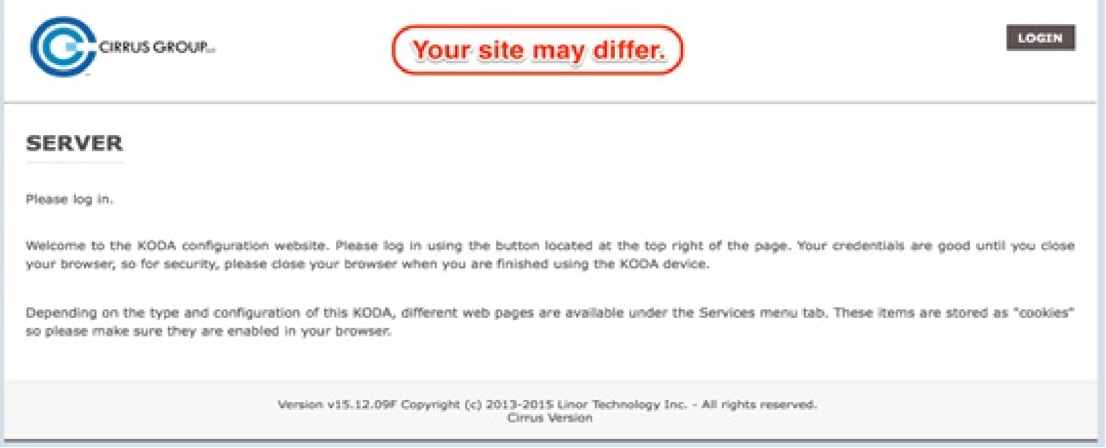
Password *: ••••••••

IP Address *: IP Address

Controller Relay Number *: Controller Number

To Setup the Door Controller-

- Connect to the module's website.
    - Retrieve the site's IP address, 192.168.1.22 (for example), and access it.
        - For help, use this link (https://www.linortek.com/downloads/support-programming/) and download 'linortek discoverer' to assist in finding the module's IP address.
    - Take note of the 'IP address' as you will use it in 'InSite Select' application.
    - Login with username and password. Username: admin, Password: admin



SERVER

Please log in.

Welcome to the KODA configuration website. Please log in using the button located at the top right of the page. Your credentials are good until you close your browser, so for security, please close your browser when you are finished using the KODA device.

Depending on the type and configuration of this KODA, different web pages are available under the Services menu tab. These items are stored as "cookies" so please make sure they are enabled in your browser.

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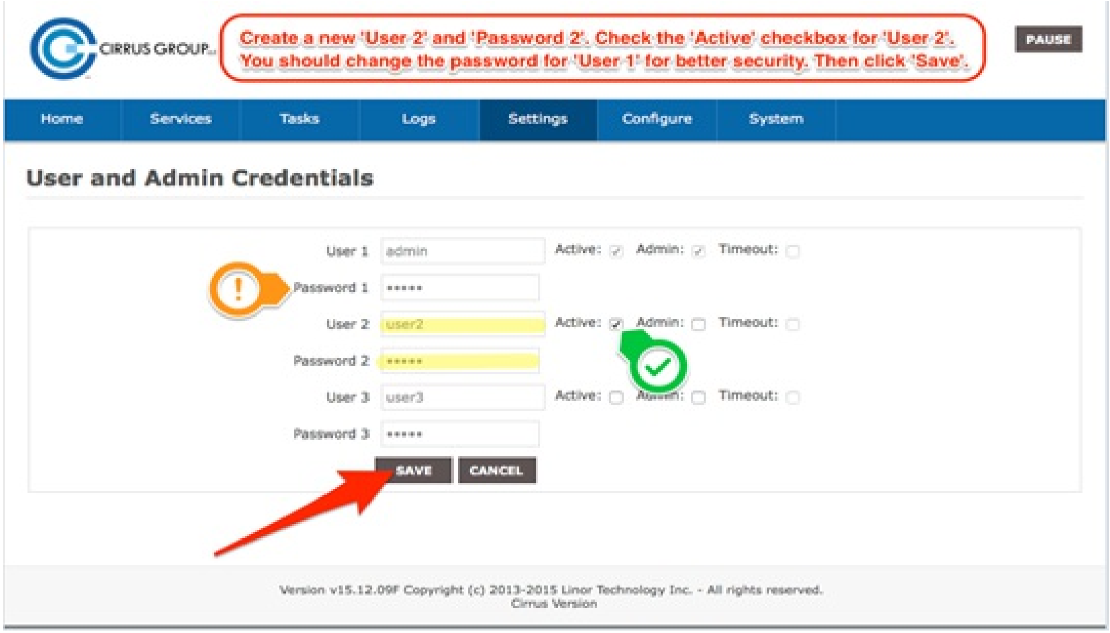
Cirrus Version

- Navigate to 'Settings' tab, then 'User and Admin Credentials'
    - Create a username for 'User 2'.
    - Create a password for 'Password 2'.
    - Mark the 'Active' checkbox which corresponds to 'User 2'.
    - Take note of this username/password as you will use it in 'Insite Select'

application.

Note: Be sure to update the User 1 admin password, be sure to keep user ID’s and passwords secure to avoid any security threats.



Create a new 'User 2' and 'Password 2'. Check the 'Active' checkbox for 'User 2'. You should change the password for 'User 1' for better security. Then click 'Save'.

User and Admin Credentials

User 1 admin Active: ☑ Admin: ☑ Timeout: ☐
Password 1 *****
User 2 user2 Active: ☑ Admin: ☐ Timeout: ☐
Password 2 *****
User 3 user3 Active: ☐ Admin: ☐ Timeout: ☐
Password 3 *****

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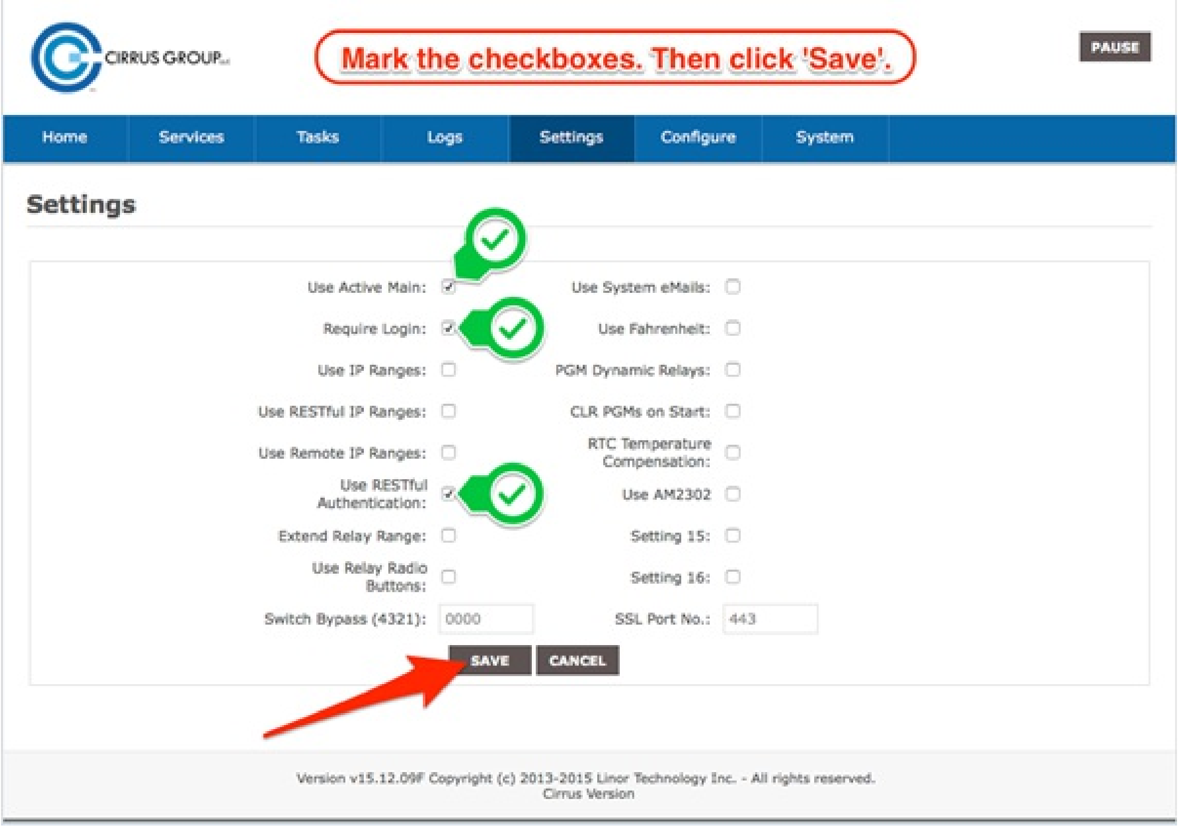
Cirrus Version

- Navigate to 'Settings' tab, then 'Settings'
  - Find 'Use Active Main' and make sure it is checked.
  - Find 'Require Login' and make sure it is checked.
  - Find 'Use RESTful Authentication' and make sure it is checked.



Mark the checkboxes. Then click 'Save'.

Settings

Use Active Main:	☑	Use System eMails:	☐
Require Login:	☑	Use Fahrenheit:	☐
Use IP Ranges:	☐	PGM Dynamic Relays:	☐
Use RESTful IP Ranges:	☐	CLR PGMs on Start:	☐
Use Remote IP Ranges:	☐	RTC Temperature Compensation:	☐
Use RESTful Authentication:	☑	Use AM2302	☐
Extend Relay Range:	☐	Setting 15:	☐
Use Relay Radio Buttons:	☐	Setting 16:	☐
Switch Bypass (4321):	0000	SSL Port No.:	443

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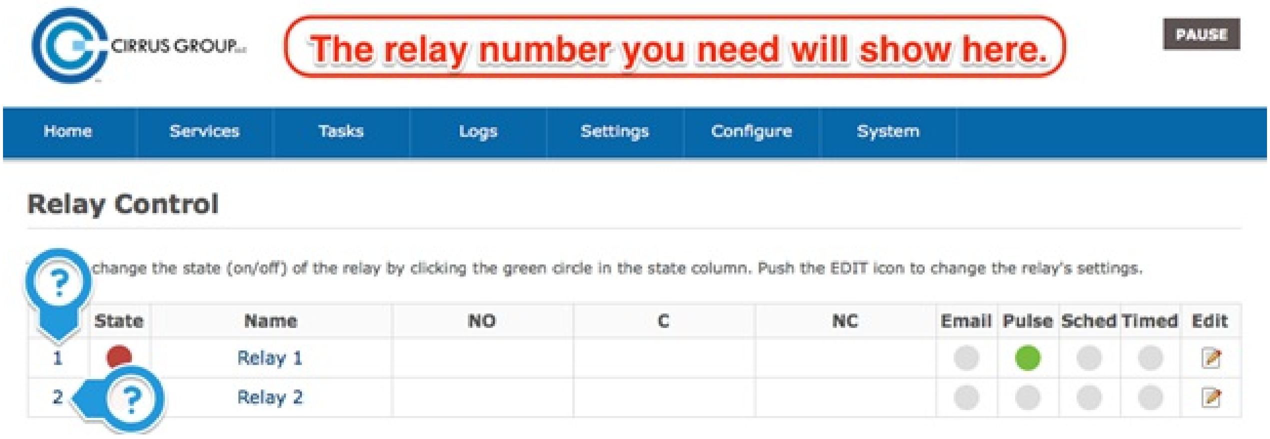
Cirrus Version

- Navigate to 'Services' tab, then 'In/Out'
  - Take note of the relay number which is being used, as you will use it in 'InSite Select' app.



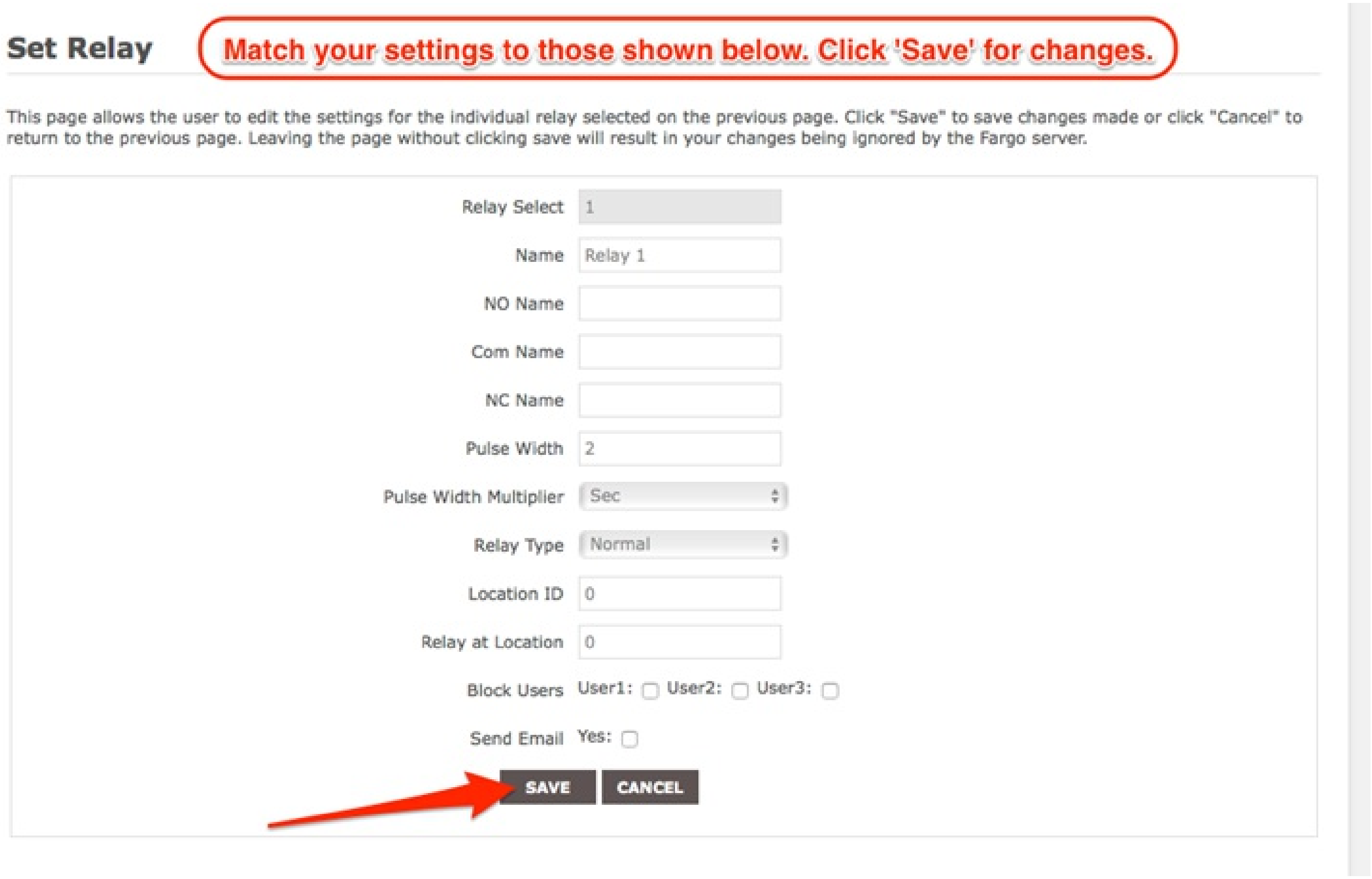
The relay number you need will show here.

Relay Control

change the state (on/off) of the relay by clicking the green circle in the state column. Push the EDIT icon to change the relay's settings.

	State	Name	NO	C	NC	Email	Pulse	Sched	Timed	Edit
1	🔴	Relay 1				⚪	🟢	⚪	⚪	✎
2		Relay 2				⚪	⚪	⚪	⚪	✎

- Make sure settings match the below image:
  - Click ‘Save’ is anything was changed/added.



Set Relay

Match your settings to those shown below. Click 'Save' for changes.

This page allows the user to edit the settings for the individual relay selected on the previous page. Click "Save" to save changes made or click "Cancel" to return to the previous page. Leaving the page without clicking save will result in your changes being ignored by the Fargo server.

Relay Select: 1
Name: Relay 1
NO Name:
Com Name:
NC Name:
Pulse Width: 2
Pulse Width Multiplier: Sec
Relay Type: Normal
Location ID: 0
Relay at Location: 0
Block Users: User1: ☐ User2: ☐ User3: ☐
Send Email: Yes: ☐

For more information click here:

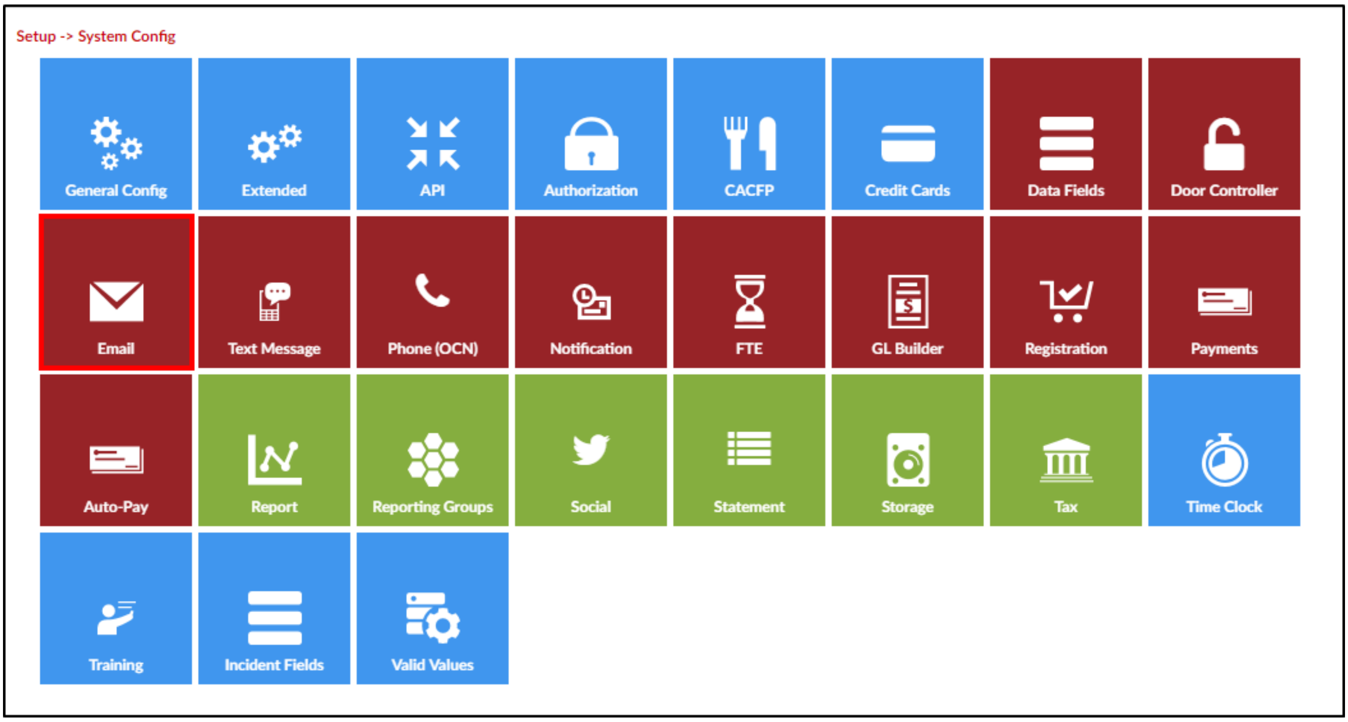
https://www.linortek.com/koda-100-ethernet-relay-controller/

Creating/Editing Email Templates

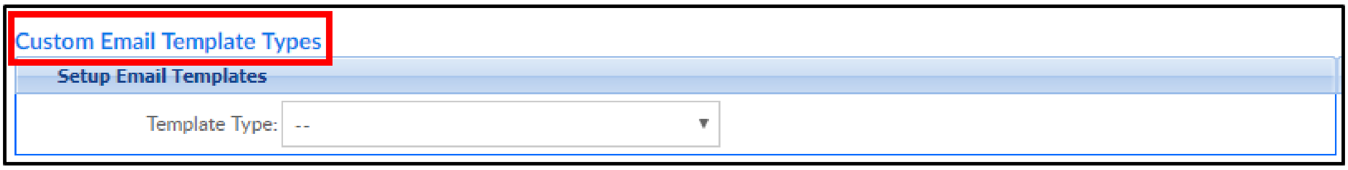
Last Modified on 01/11/2019 8:37 am EST

Email templates are messages that are created by administrators and have the ability to be sent from the Connect > Communication screen.

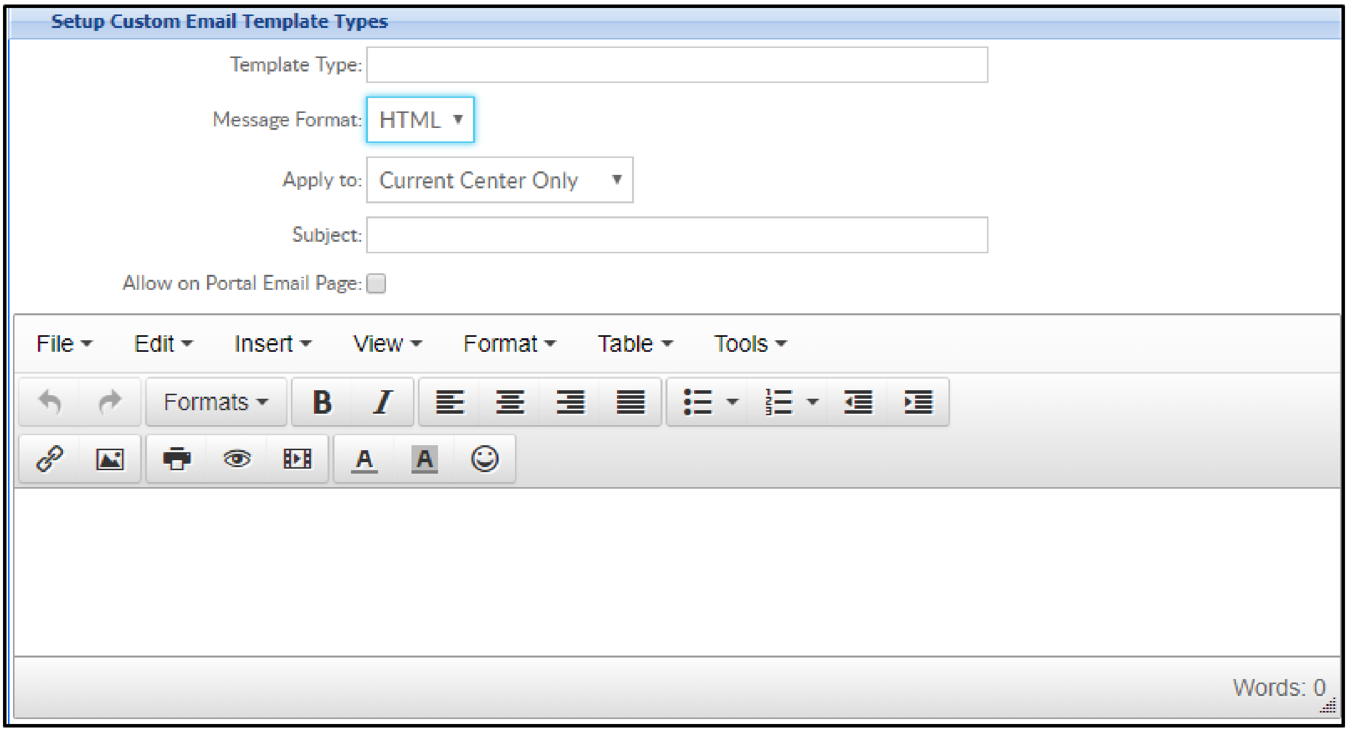
1. Click Setup, select System Config then, click Email



2. Click Custom Email Template Types to create a new template select an existing template to update from the drop-down menu



3. Complete the Setup Custom Email Template Types section



Setup Custom Email Template Types

Template Type:

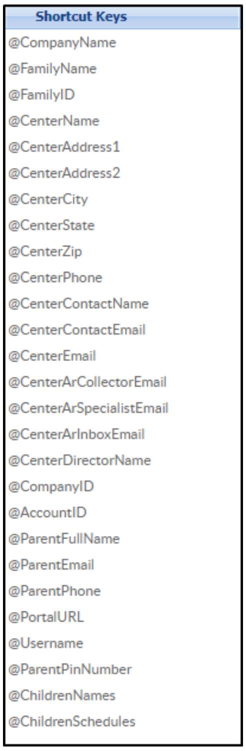
Message Format: HTML

Apply to: Current Center Only

Subject:

Allow on Portal Email Page: ☐

4. Template Type - enter a name for the template
5. Message Format - HTML (recommended)
6. Apply to - choose a center from the drop-down or select All Centers
7. Subject - enter the subject that should display to parents
8. Allow on Portal Email Page - always select this option so the template can be sent from Connect>Communication
9. Enter the message. Use the shortcuts on the right in the Shortcut Key section to customize the template



Shortcut Keys

@CompanyName
@FamilyName
@FamilyID
@CenterName
@CenterAddress1
@CenterAddress2
@CenterCity
@CenterState
@CenterZip
@CenterPhone
@CenterContactName
@CenterContactEmail
@CenterEmail
@CenterArCollectorEmail
@CenterArSpecialistEmail
@CenterArInboxEmail
@CenterDirectorName
@CompanyID
@AccountID
@ParentFullName
@ParentEmail
@ParentPhone
@PortalURL
@Username
@ParentPinNumber
@ChildrenNames
@ChildrenSchedules

10. Click Save

Sample Email Templates

Last Modified on 10/15/2018 1:44 pm EDT

Email Templates

Email templates can be setup by going to setup > system config, once on the system config page select the Email option. Under the Setup Email Templates area select the template type you would like to create from the drop-down menu. Then select Apply To: All Centers and change the Message Format to HTML.

The verbiage below is sample wording for the templates. You can update, add or change the message based on your center's needs. You can use the shortcut keys displayed on the right of the Setup Email Templates to customize your message. To view when each email would be sent out go to the setup > system config- notifications screen.

Waiting List Approval

This email confirms that registration is complete and enrollment in the following session has been approved:
Child's Name: @ChildFullName
Family Account #: @FamilyId
@CenterName - @ProgramName - @CategoryName - @SemesterName - @ProgramStartDate - @ProgramEndDate
Your child may begin on: @ProgramStartDate
A separate email confirmation will be sent for each requested session that is approved.
Thank you for your registration.
@Note

Late Pickup

Dear @FamilyName,

A @FeeApplyType has been added to your family's account for the date of @FeeDate, @ChildFullName was picked up after center hours.

The fee of @FeeAmount for @NumberOfMinutes minutes can be paid by logging into the parent portal and making a onetime payment. If you have registered for auto-pay the fee will be taken when your next payment is processed.

Thank you,

@CenterName

Payment Success

@CompanyName Online Payment Information, Payment Success

Payment DATE: @PaymentDate
FIRST NAME: @PayerFirstName
LAST NAME: @PayerLastName
Amount: $ @PaymentAmount

Message: @PaymentType Payment was successful
Tracking ID: @TrackingNumber
Invoice #: @InvoiceNumber

Payment Failure

@CompanyName Online Payment Information, Payment Failure- please try again

Payment DATE: @PaymentDate
FIRST NAME: @PayerFirstName
LAST NAME: @PayerLastName
Amount: $ @PaymentAmount

Payment STATUS: Failed
Error Message: @PaymentErrorMsg
Tracking ID: @TrackingNumber
Invoice #: @InvoiceNumber

Family Statement Reminder

Dear @FamilyName,

An outstanding balance of @AmountOwed is open on your account. Please login to the parent portal and submit a onetime payment to bring your account current.

If you have any questions or concerns regarding this open balance please contact your center director.

Thank you!

@CenterName

Family Statement

Dear @FamilyName,

Please see the attached copy of your family’s statement. You can login to the parent portal to remit payment for the outstanding balance or register for autopayments.

If you have any questions or concerns regarding this open balance please contact your center director.

Thank you!

@CenterName

Waiting List Entry

Dear @ParentFullName,

Your child has been placed onto the waiting list at our (insert business name here).

Thank you for your interest.

Missing Child Procedure

Dear @FamilyName,

Your child, @ChildFullName has been marked as missing at @CenterName. Please contact the center immediately to confirm your child’s status.

Thank you,

@CenterName

@CenterAddress1

@CenterAddress2

@CenterCity , @CenterState @CenterZip

@CenterPhone

AutoPay Approval

@CompanyName Online Payment Information, AutoPay Success!

Payment DATE: @PaymentDate
FIRST NAME: @PayerFirstName
LAST NAME: @PayerLastName
Amount: $ @PaymentAmount

Message: @PaymentType Payment was successful
Tracking ID: @TrackingNumber
Invoice #: @InvoiceNumber

Autopay Rejection

@CompanyName Online Payment Information, AutoPay Failure

Payment DATE: @PaymentDate
FIRST NAME: @PayerFirstName
LAST NAME: @PayerLastName
Amount: $ @PaymentAmount

Payment STATUS: Failed
Error Message: @PaymentErrorMsg
Tracking ID: @TrackingNumber
Invoice #: @InvoiceNumber

Child Note

Hello,

@Note

Thank you!

@CenterName

Registration Approval

Your registration has been approved.

@RegistrationInformation

Now that your registration has been approved you have gained access to our parent portal. From the portal you will be able to make onetime payments, setup autopayments, pull statements, update your child's detail on file, signup for new programming and view your child's attendance.

To login to the parent portal visit @PortalURL

Your username was setup during the registration process, as a reminder your username is @Username.

Please keep track of your PIN number- @PIN , you will need to use this to login/logout your child from the center.

RegIstration Rejection

We regret that we are not able to offer you admission to the program. Thank you for your interest in our programming.

Registration Confirmation- Parent

Dear @FamilyName ,

Your registration has been received. Once your registration has been approved, you will receive an approval email.

@FinishingText

@RegistrationInformation

Thank you for your interest in our programming!

Registration Confirmation- Admin

A new registration has been received for the @FamilyName.

@RegistrationInformation

Outstanding Balance- Fee Added

Dear @FamilyName,

A @FeeDescription fee has been added to your account for @FeeAmount. The total balance owed on your account is @AmountOwed. Please login to the parent portal to submit a onetime payment immediately.

If you have any questions or concerns regarding this open balance please contact your center director.

Thank you!

@CenterName

Unscheduled Attendance Fee

Dear @FamilyName,

Your child- @ChildFullName attended one of our programs today and was not scheduled. A fee of @FeeAmount has been added to your account, please login to the parent portal to submit a onetime payment immediately.

If you have any questions or concerns regarding this open balance please contact your center director.

Thank you!

@CenterName

Parent Portal- New Account

This email is to introduce you to our new child care management software. We will no longer have a paper and pencil sign-in/out system.

You will now have access to an online parent portal and a downloadable application, where you can pay your bill, view statements, and update your child's information as needed. The downloadable application is called Insite Connect. Search for this in your app store and download.

Included in this email is your User ID, temporary password, and a link to the parent portal. Once you sign into the portal you will find your PIN number by going to the personal tab on the home page. Each parent will have a unique PIN displayed under the parent section of the personal page.

User ID: @Username

Temporary Password: @Username

https://family.daycareworks.com/login.jsp

The first time you log into the parent portal you will be asked to create a new password. In order to sign your child in and out you must have the assigned PIN number with you. We are very excited about this new software and will continue to roll out more of the wonderful features as we progress through the school year. If you have any questions or problems logging in please reach out to your Site Director for assistance.

Registration Approval- Admin

A new registration has been approved for the @FamilyName.

@RegistrationInformation

Schedule Change Request Approval

Dear @FamilyName,

Your recent schedule change request has been APPROVED.

Request Date: @RequestDate

Effective Date: @EffectiveDate

Program: @ProgramName

New Schedule: @NewSchedule

Please login to the parent portal to review updates or request additional changes.

Thank you,

@CenterName

Schedule Change Request Rejection

Dear @FamilyName,

Your recent schedule change request has been REJECTED.

Request Date: @RequestDate

Effective Date: @EffectiveDate

Program: @ProgramName

New Schedule: @NewSchedule

Please contact the center director if you have any questions or concerns.

Thank you,

@CenterName

NSF Notification

Your recent payment to our center was returned as NSF. Please login to the parent portal to remit a onetime payment or contact the center director to review payment detail.

Thank you!

Suspension Warning

Your account has been suspended. Please contact the center director for additional information.

Room Capacity Reached

Room Capacity Reached:

Center: @CenterName

Program: @ProgramName

Category: @CategoryName

Semester: @SemesterName

Start Date: @ProgramStartDate

End Date: @ProgramEndDate

Room Capacity: @RoomCapacity

Enrolled: @Enrolled

Waiting List Admin PRA Save

@ChildFullName has been added to the wait list for @SemesterName @ProgramName program as of @WaitlistDateTime at @CenterName.

Thank you!

System Config > Text Message

Last Modified on 04/03/2018 10:55 am EDT

The text message section of the system config screen is where API information can be added for texting integration.

Texting with parents is in conjunction with a third party, below is a bit of information on the two vendors we support.

Fees for SMS start at around $0.006 per message sent and depend on if they need a dedicated SMS shortcode or not. These fees are from the SMS service vendors themselves, not Cirrus Group, and requires you to sign up for the services directly.

Cirrus Group does not charge for SMS messaging integration or per message fees through our platform for current clients.

The two supported SMS vendors are Nexmo.com – Good if you don't need a dedicated short code and Twilio.com – Good if you want a dedicated short code.

Once you select a vendor and sign up you will need to provide us with:

- API Key
- API Secret
- Short Code (if applicable)
- Phone Number
- If you want to send the texts from short code or from a phone number

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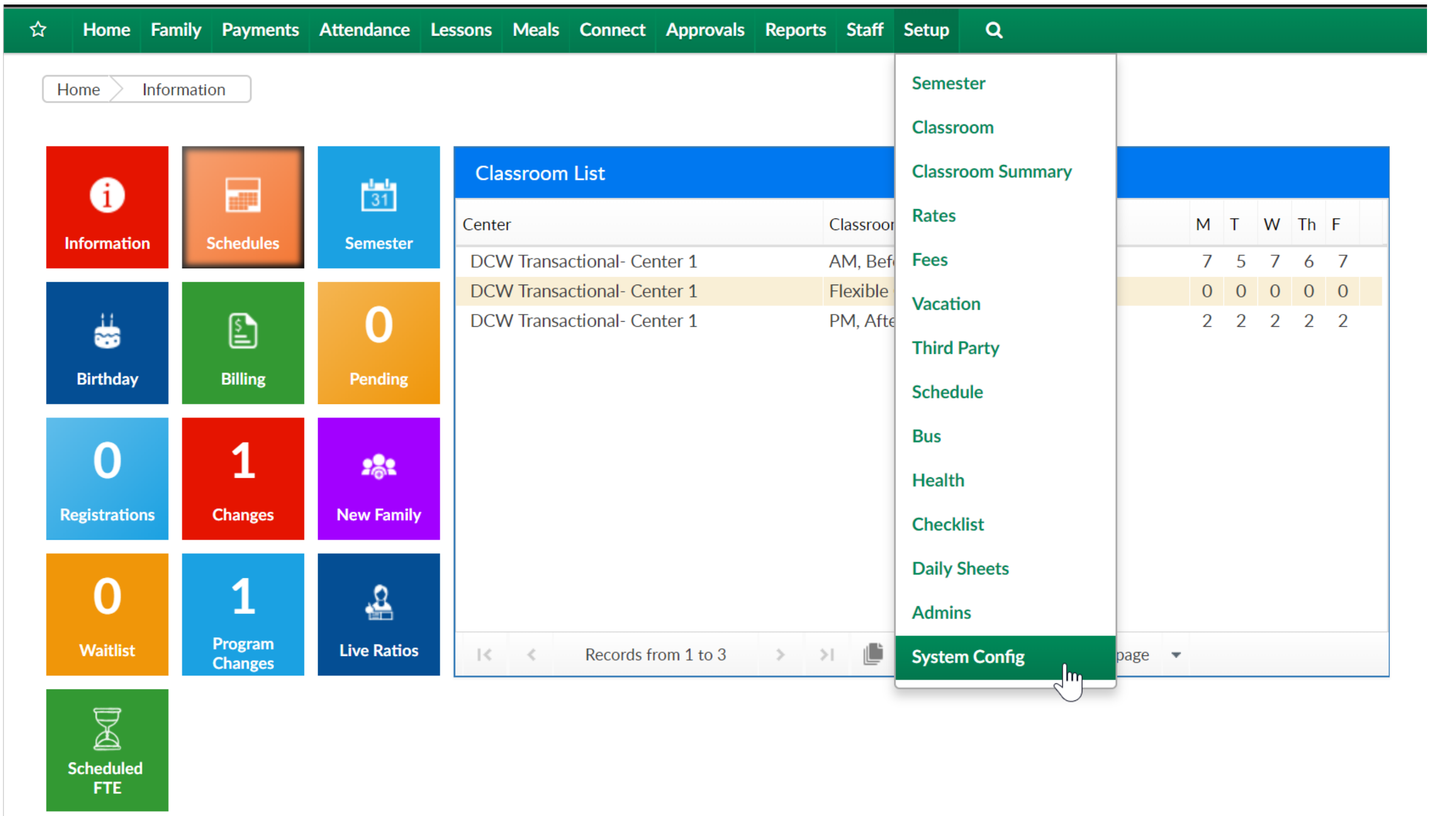
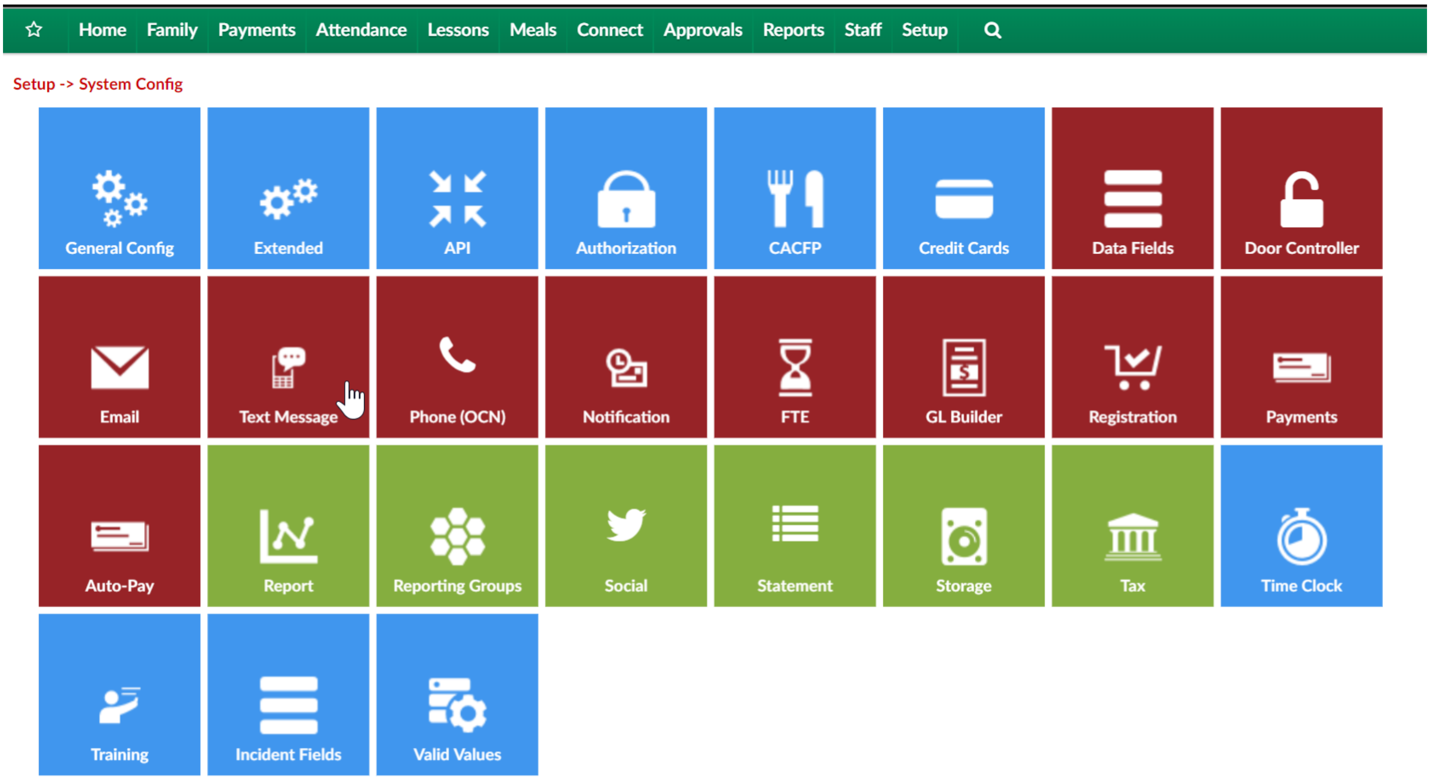
From the Setup screen, go to the System Config option.



Center	Classroor		M	T	W	Th	F
DCW Transactional- Center 1	AM, Bef		7	5	7	6	7
DCW Transactional- Center 1	Flexible		0	0	0	0	0
DCW Transactional- Center 1	PM, Afte		2	2	2	2	2

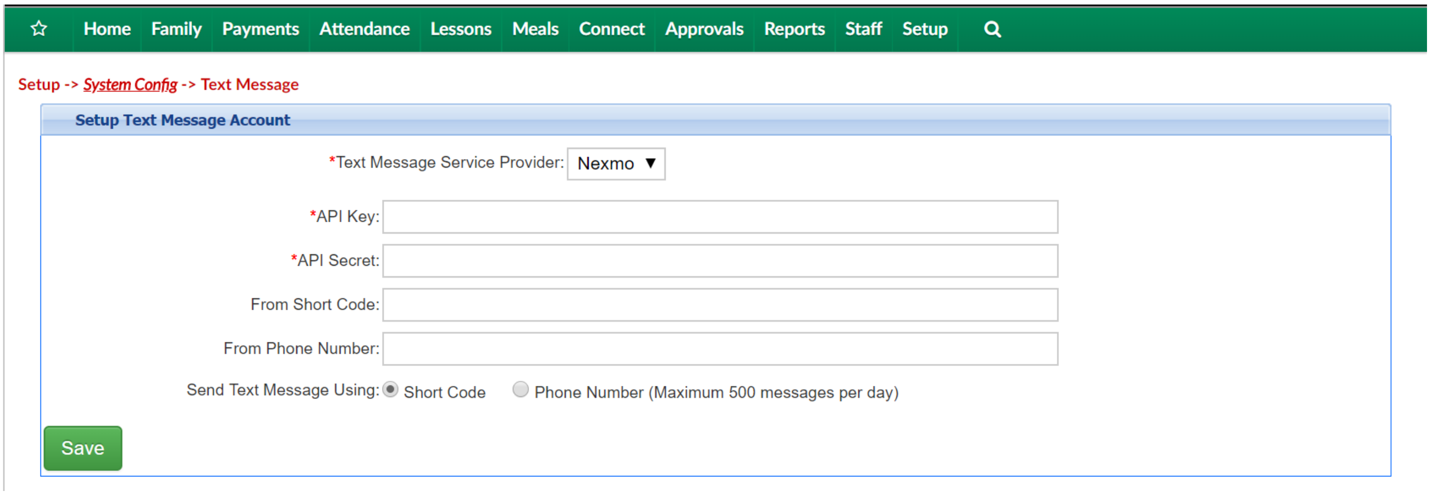
Then select Text Message-



On the Text Message screen complete the required fields, then press Save.

- Text Message Service Provider- select the provider you have signed up with
- API Key- this will be given to you by the service provider

- API Secret- this will be given to you by the service provider
- From Short Code- enter the short code you have purchased
- From Phone Number- enter the phone number texts will be sent from
- Send Text Message Using- Short Code or Phone Number



Setup -> System Config -> Text Message

Setup Text Message Account

*Text Message Service Provider: Nexmo ▼

*API Key:

*API Secret:

From Short Code:

From Phone Number:

Send Text Message Using: ● Short Code ○ Phone Number (Maximum 500 messages per day)

System Config > FTE

Last Modified on 12/21/2018 3:30 pm EST

Setting up FTE in the Platform allows businesses the ability to track full time equivalency credits for children in the Platform. The allows a center to know the relative capacity of a center based on both full and half time children attending program.

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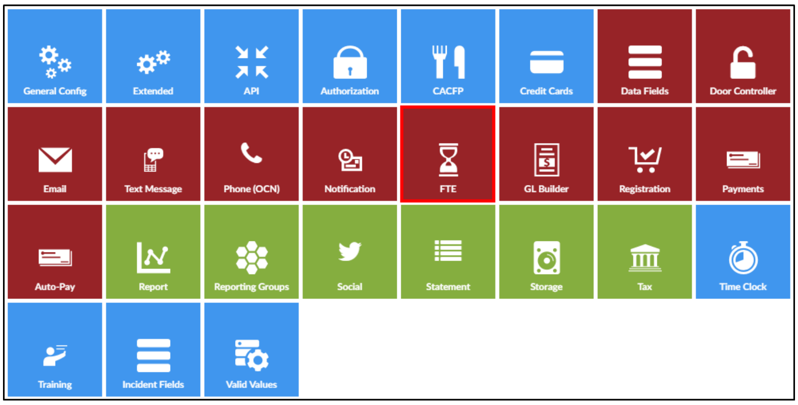
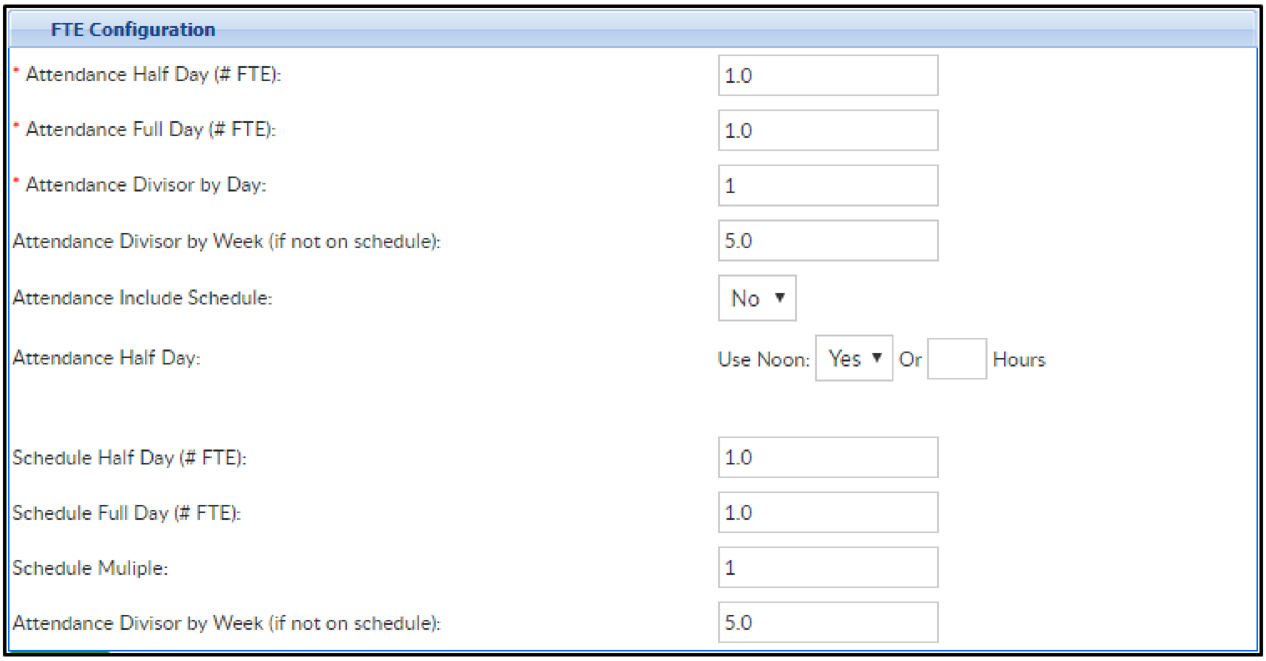
1. From the Setup menu, click System Config, then select FTE



2. Complete the FTE Configuration section
    - Attendance Half Day (# FTE) - enter the number of full time equivalency credits for a half day of actual attendance
    - Attendance Full Day (#FTE) - enter the number of full tie equivalency credits for a full day of actual attendance for the facility
    - Attendance Divisor by Day - enter the assigned divider that will be applied to the attendance half/full day
    - Attendance Divisor by Week (if not on schedule) - enter the assigned divider that will be applied to attendance by the week and will only be used if the division is not on a student's schedule
    - Attendance Include Schedule
        - Yes - include scheduled attendance for the calculation of FTE for the student
        - No - the FTE will only be calculated based on actual attendance in the facility
    - Attendance Half Day
        - Yes - attendance up to noon will be recorded as a half day. Then enter

        the number of hours for the student's attendance that will be applied as a half day
        - No -
    - Schedule Half Day (#FTE) - enter the number of full time equivalency credits for a half day of scheduled attendance
    - Schedule Full Day (#FTE) - enter the number of full time equivalency credits for a full day of scheduled attendance
    - Schedule Multiple - enter the assigned multiple that will be applied to the Schedule Half/Full Day
    - Attendance Divisor by Week (if not on schedule) - enter the assigned divider that will be applied to attendance by the week



FTE Configuration

* Attendance Half Day (# FTE): 1.0

* Attendance Full Day (# FTE): 1.0

* Attendance Divisor by Day: 1

Attendance Divisor by Week (if not on schedule): 5.0

Attendance Include Schedule: No

Attendance Half Day: Use Noon: Yes Or Hours

Schedule Half Day (# FTE): 1.0

Schedule Full Day (# FTE): 1.0

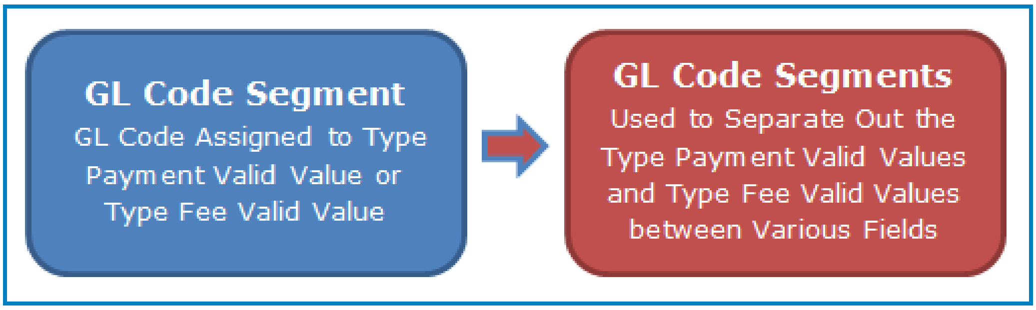
Schedule Muliple: 1

Attendance Divisor by Week (if not on schedule): 5.0

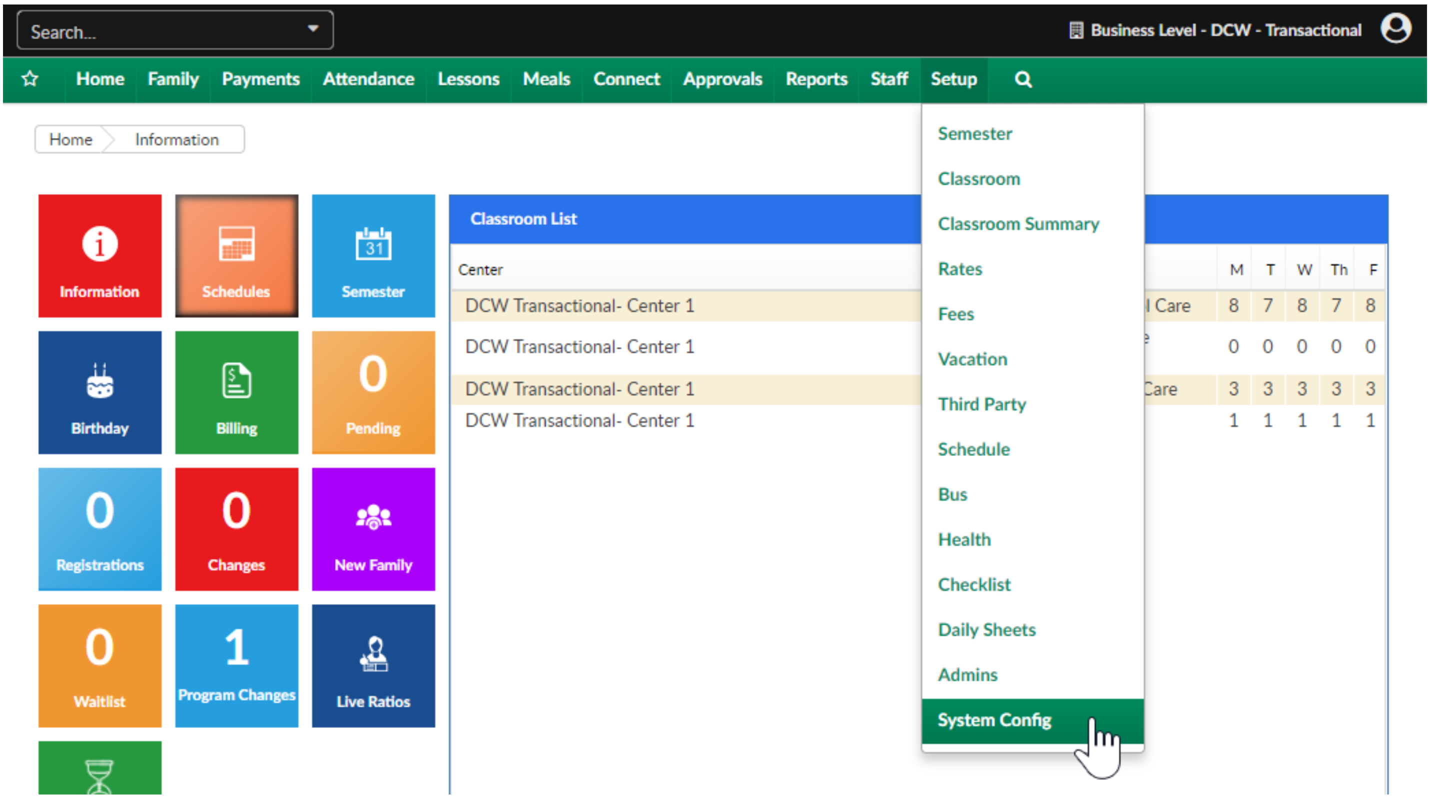
System Config > GL Builder

Last Modified on 05/02/2018 9:18 am EDT

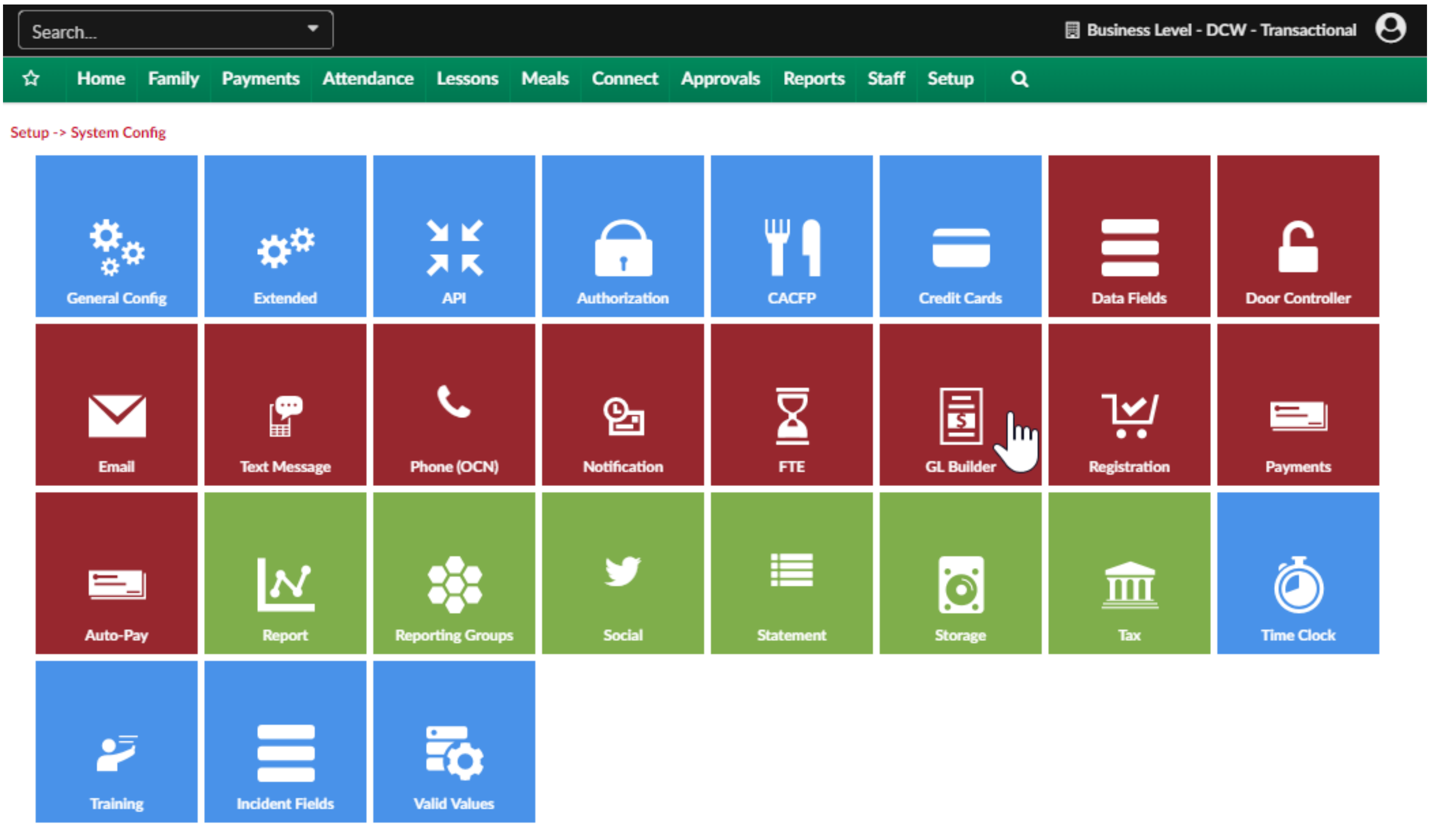
The general ledger builder allows users to create short code that attach to valid values. When this is done the system will be able to pull detail for how a revenue or payment type valid value should be classified.



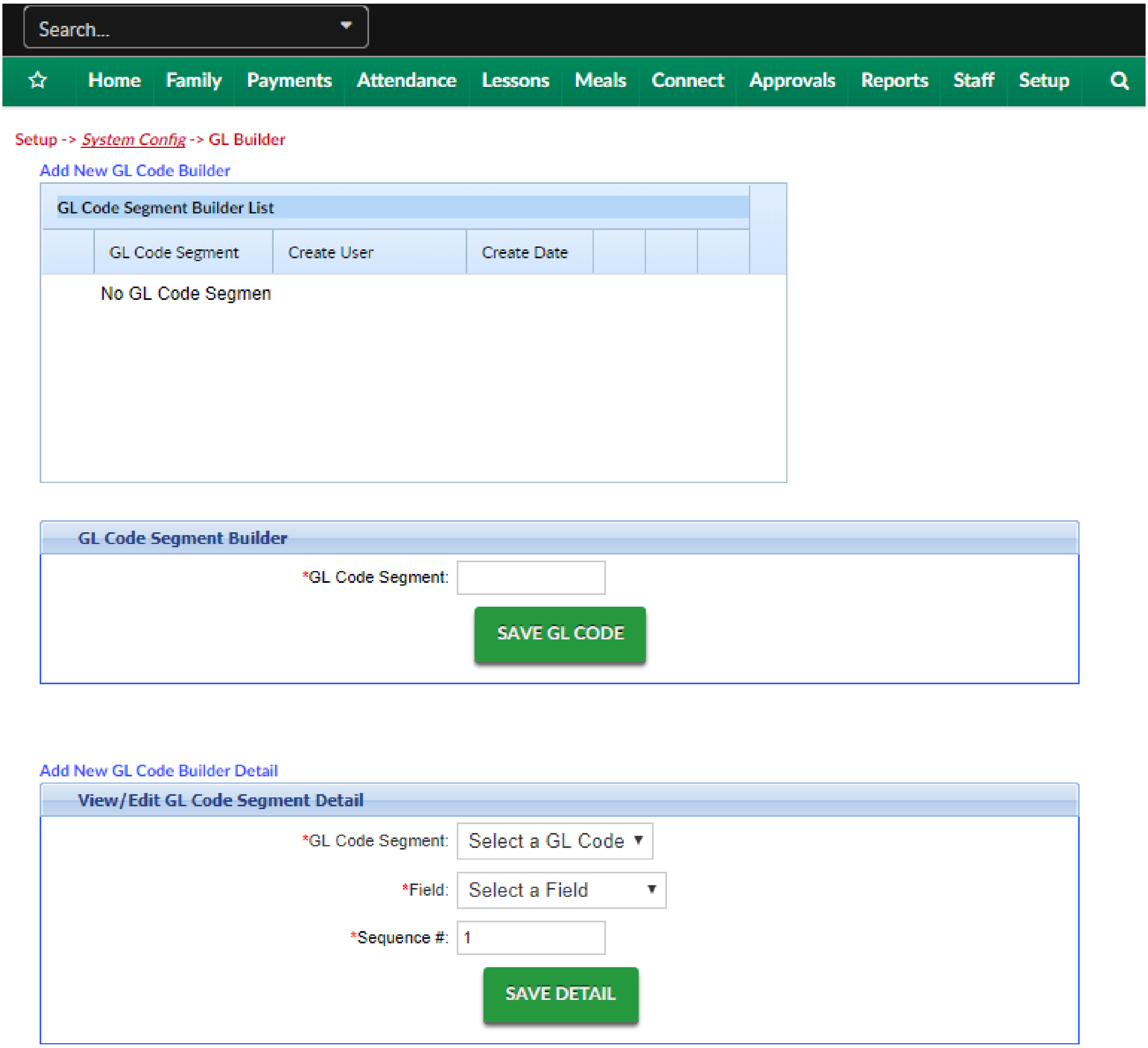
From the setup menu, select system config-



Then select GL Builder-



The GL Builder screen will display short codes that have already been created and allow users to setup new shortcut codes/account strings.



Setup -> *System Config* -> GL Builder

Add New GL Code Builder

GL Code Segment Builder List

	GL Code Segment	Create User	Create Date			
	No GL Code Segmen					

GL Code Segment Builder

*GL Code Segment:

Add New GL Code Builder Detail

View/Edit GL Code Segment Detail

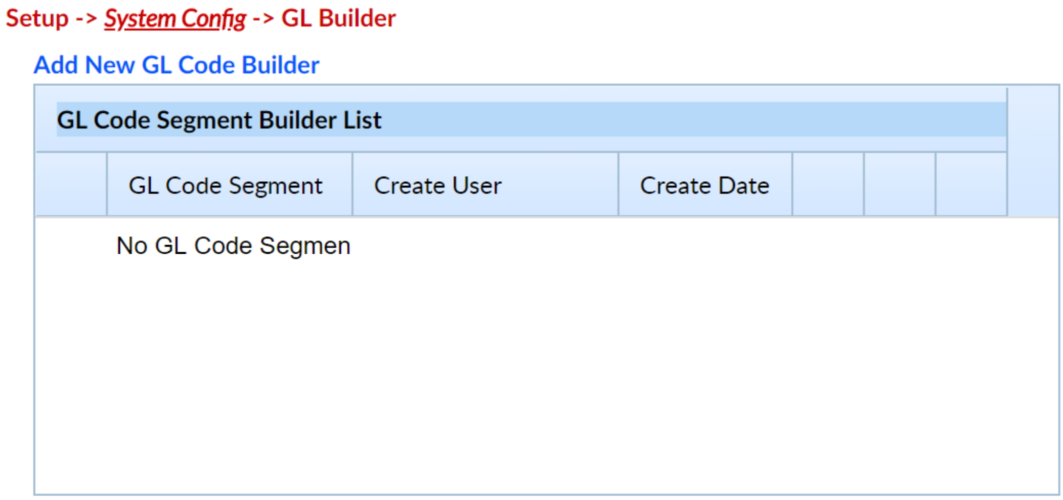
*GL Code Segment: Select a GL Code ▾

*Field: Select a Field ▾

*Sequence #: 1

Step 1- add a GL Code Segment, then press Save GL Code-

This code will be a shortcut that you will place on a specific valid value to call for the segments you will build in the next steps.



Setup -> *System Config* -> GL Builder

Add New GL Code Builder

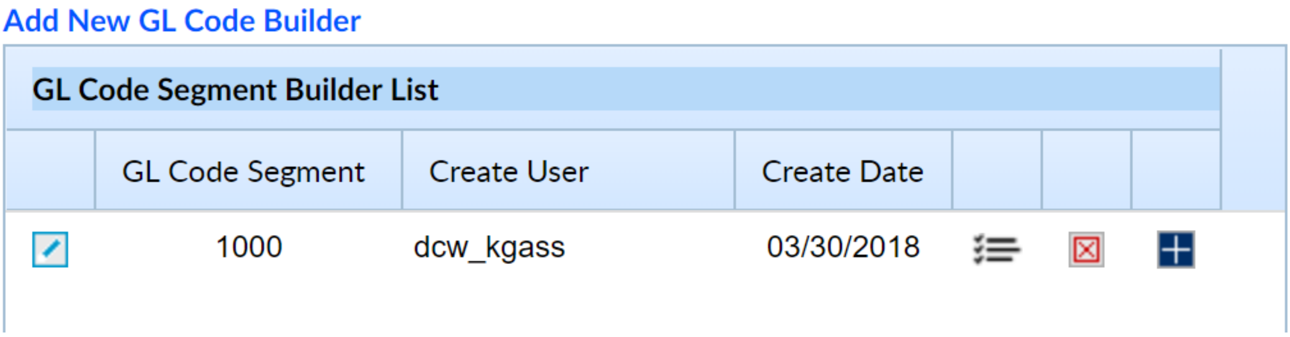
GL Code Segment Builder List

	GL Code Segment	Create User	Create Date			
	No GL Code Segmen					

GL Code Segment Builder

*GL Code Segment: 1000

The short code will display in the GL Code Segment Builder List-



Add New GL Code Builder

GL Code Segment Builder List

	GL Code Segment	Create User	Create Date			
✎	1000	dcw_kgass	03/30/2018	☰	☒	➕

Step 2- To define what the short code means scroll to the bottom of the page and select the GL Code Segment, then select what type of field segment 1 should be. Save Detail.

The fields that display allow the system to pull an account number from a place in the system such as the room, room category, semester, rate etc. This means that your GL strings can be flexible.

- Select Manual to manually create a GL Code segment that will be attached to the GL Code. After selecting Manual, a Manual Code text box will appear that administrators can enter in the general ledger code.

- Select Brand to attach the GL Code assigned to the brand in the

Platform. The Brand GL Code is setup in the Valid Value section for the specific Brand. A Brand is attached to a center on the General tab for the center on the Home screen.

- Select Division to attach the GL Code assigned to the division in the Platform. The Division GL Code is setup in the Valid Value section for the specific Division. A Division is attached to a center on the General tab for the center on the Homescreen.
- Select District to attach the GL Code assigned to the district in the Platform. The District GL Code is setup in the Valid Value section for the specific District. A District is attached to a center on the General tab for the center on the Homescreen.
- Select Center to attach the Internal Center ID assigned to the center or center in the Platform. If there is no Internal Center ID setup for the center, the Platform will attach the DCW ID associated to the center. The Internal Center ID is setup on the General tab for the center on the Home screen.
- Select Rate Category to attach the GL Code assigned to the rate category for a rate in the Platform. The Rate Category GLis setup when creating a Rate Category, located in the Rate Category link on the Rates section in the Setup tab on the main toolbar.
- Select Rate to attach the GL Code assigned to the rate in the Platform. The Rate GL is setup when created a rate in the Rates section in the Setup tab on the main toolbar.
- Select Room Category to attach the GL Code assigned to a category in the Platform. The Room Category GL is setup when creating a Category in the Rooms tab in the Setup tab on the main toolbar.
- Select Room to attach the GL Code assigned to the classroom or room in the Platform. The Room GL is setup when creating a Classroom in the Rooms tab in the Setup tab on the main toolbar.
- Select Agency to attach the GL Code assigned to a third party agency or sponsor in the Platform. The Agency GL is setup when creating a third party agency in the Sponsor tab in the Setup tab on the main toolbar.

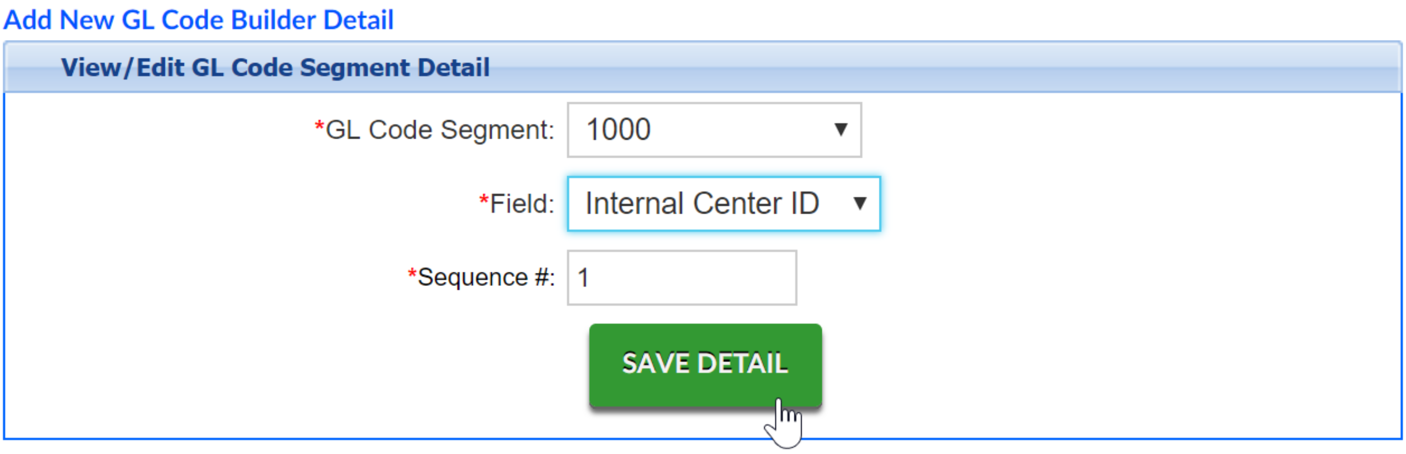
- Select Facility to attach the GL Code assigned to a facility in the Platform.

- Select Cost Center to attach the Cost Center GL Code associated to a Revenue Type Valid Value. The Cost Center GLis setup on the General tab for the center on the Home screen.

Examples-

If you want to pull in which center is assocaited to the billing being created, you could choose internal center ID as your field type. Then you would go to the home > general page and add your center identifier to the interal center ID field. This means that when the system bills out the internal center ID field will change based on where the revenue or payment is being allocated. Center 1 might be equal to 01, center 2 might be equal to 02 etc.

If your account number changes by type of tuition being billed, you could select the rate option from the field list- then under the setup > rate screen you would add the account number assocaited to each specific rate. When billing was created the system would look at which rate was being charged out to form the GL string.



Add New GL Code Builder Detail

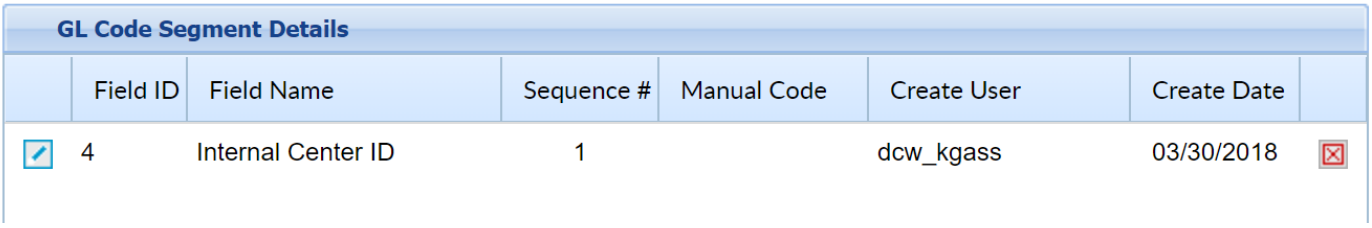
View/Edit GL Code Segment Detail

*GL Code Segment: 1000

*Field: Internal Center ID

*Sequence #: 1

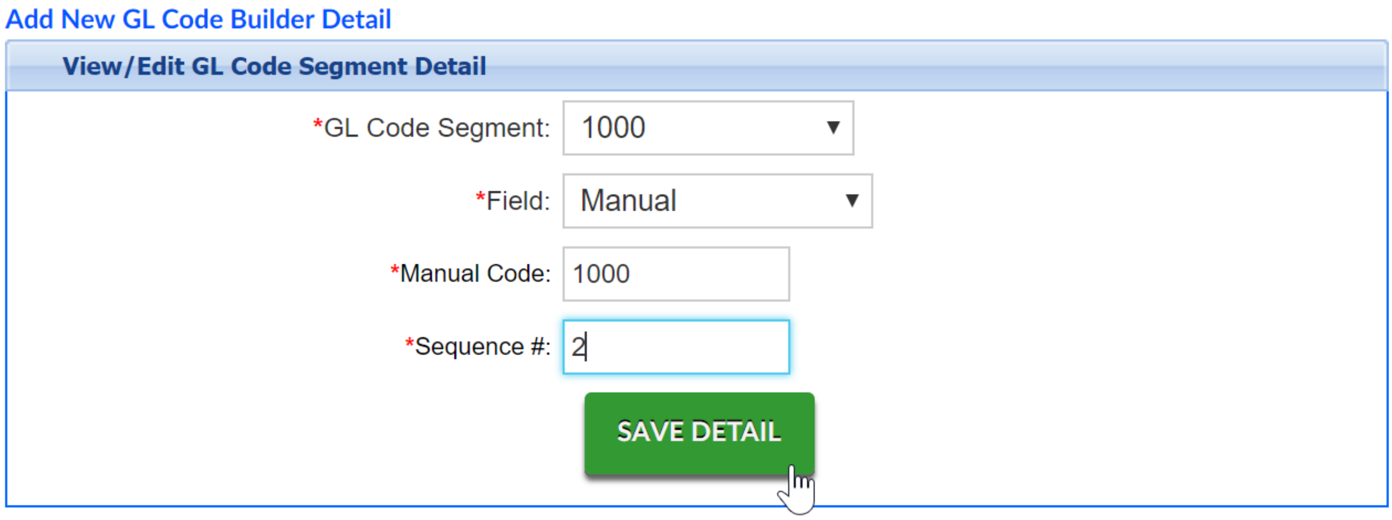
The GL detail will display in the box above-



GL Code Segment Details

	Field ID	Field Name	Sequence #	Manual Code	Create User	Create Date	
✎	4	Internal Center ID	1		dcw_kgass	03/30/2018	☒

Continue adding segments until your GL string has been built out.



Add New GL Code Builder Detail

View/Edit GL Code Segment Detail

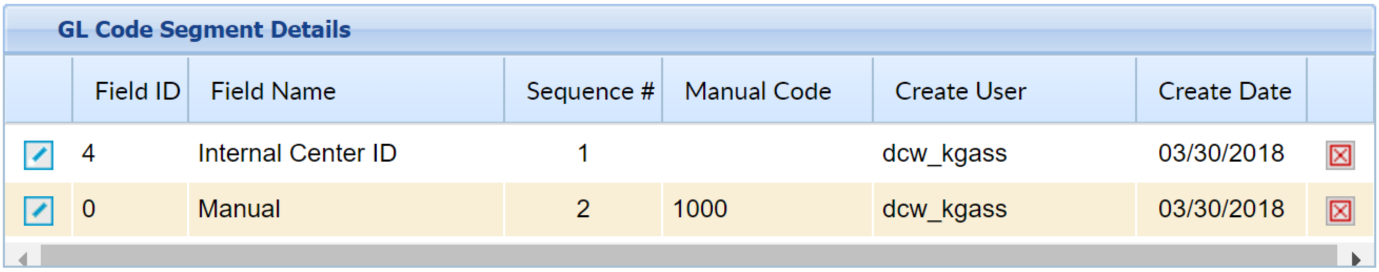
*GL Code Segment: 1000

*Field: Manual

*Manual Code: 1000

*Sequence #: 2

The string has been built out-



GL Code Segment Details

	Field ID	Field Name	Sequence #	Manual Code	Create User	Create Date	
✎	4	Internal Center ID	1		dcw_kgass	03/30/2018	☒
✎	0	Manual	2	1000	dcw_kgass	03/30/2018	☒

Example- If a GL string in your financial system is 01.1000

The first step would be to create a short code which will typically be a number between 3-5 digits something like 1000. 1000 might stand for a revenue account related to a tuition valid value.

Under the short code of 1000 segments can be added. This means that any valid value that is associated to 1000 will pull the GL string by the segments that are under the short code.

Short Code, 1000= internal Center id, 01 + manual, 1000

Segment 1 might be setup as internal center ID (found under each centers Home > General tab), Segment 2 might be set as room category (accounting code under the room category on the Setup > Room page). Whenever Tuition revenue is billed out or credited the associated string that will pull will display as Internal Center ID.Room Category Account Code.

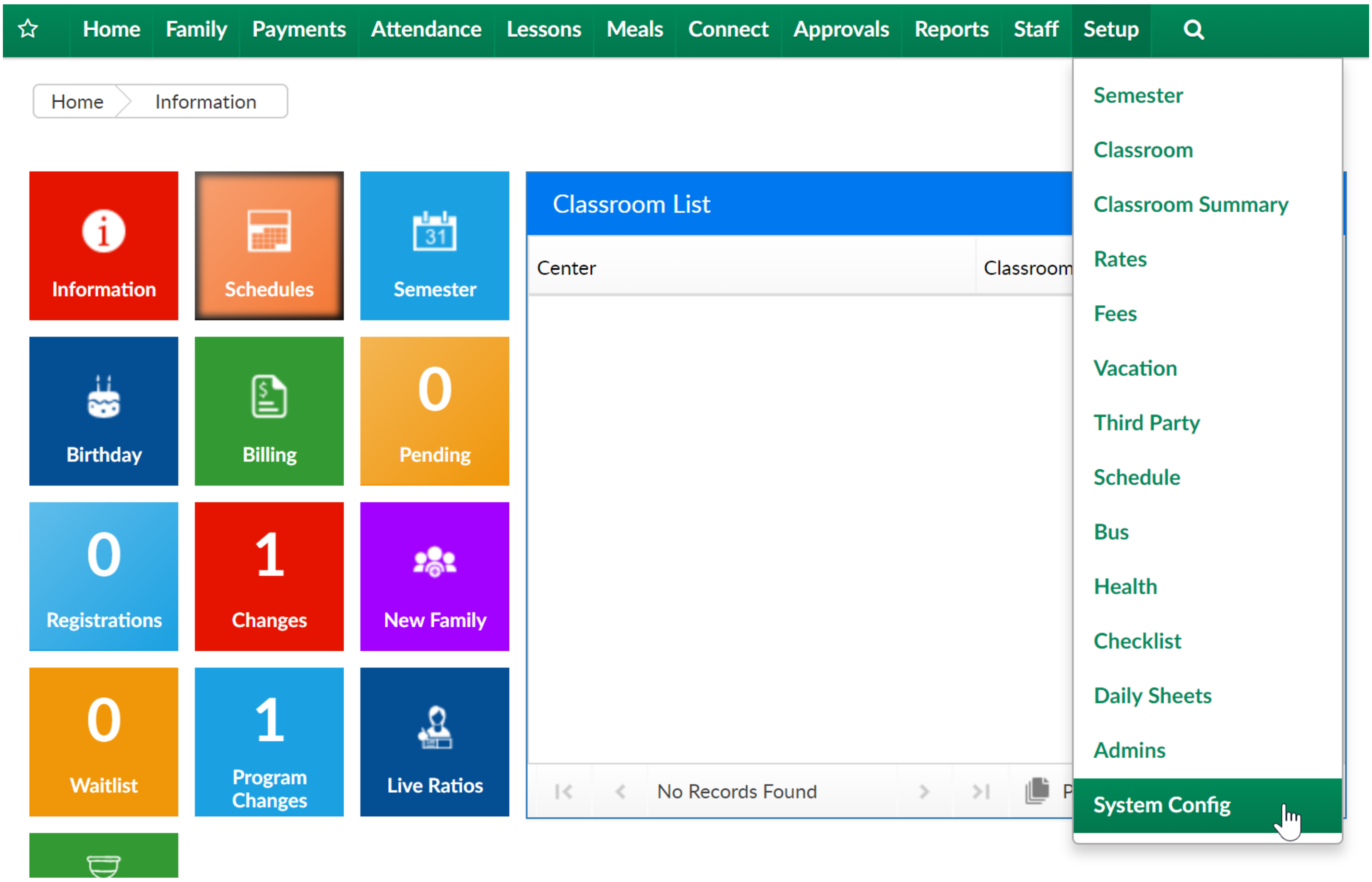
Once your string has been built out you will need to associate your GL short code to a valid value. Go to Setup > System Config, Valid Values

System Config > Registration

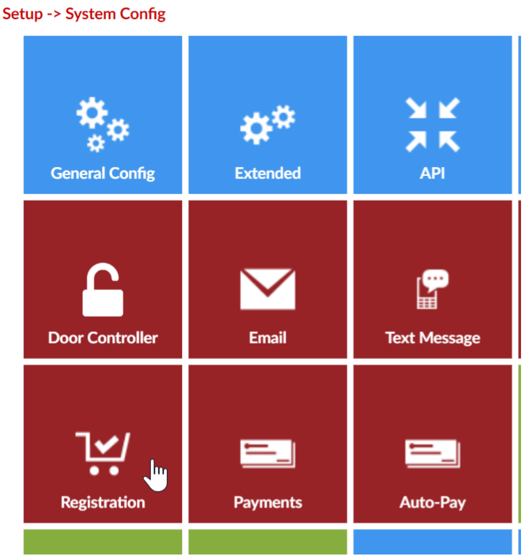
Last Modified on 04/30/2018 7:47 am EDT

The Setup > System Config, Registration option allows users to customize the family registration experience.

From the Setup menu, select System Config.

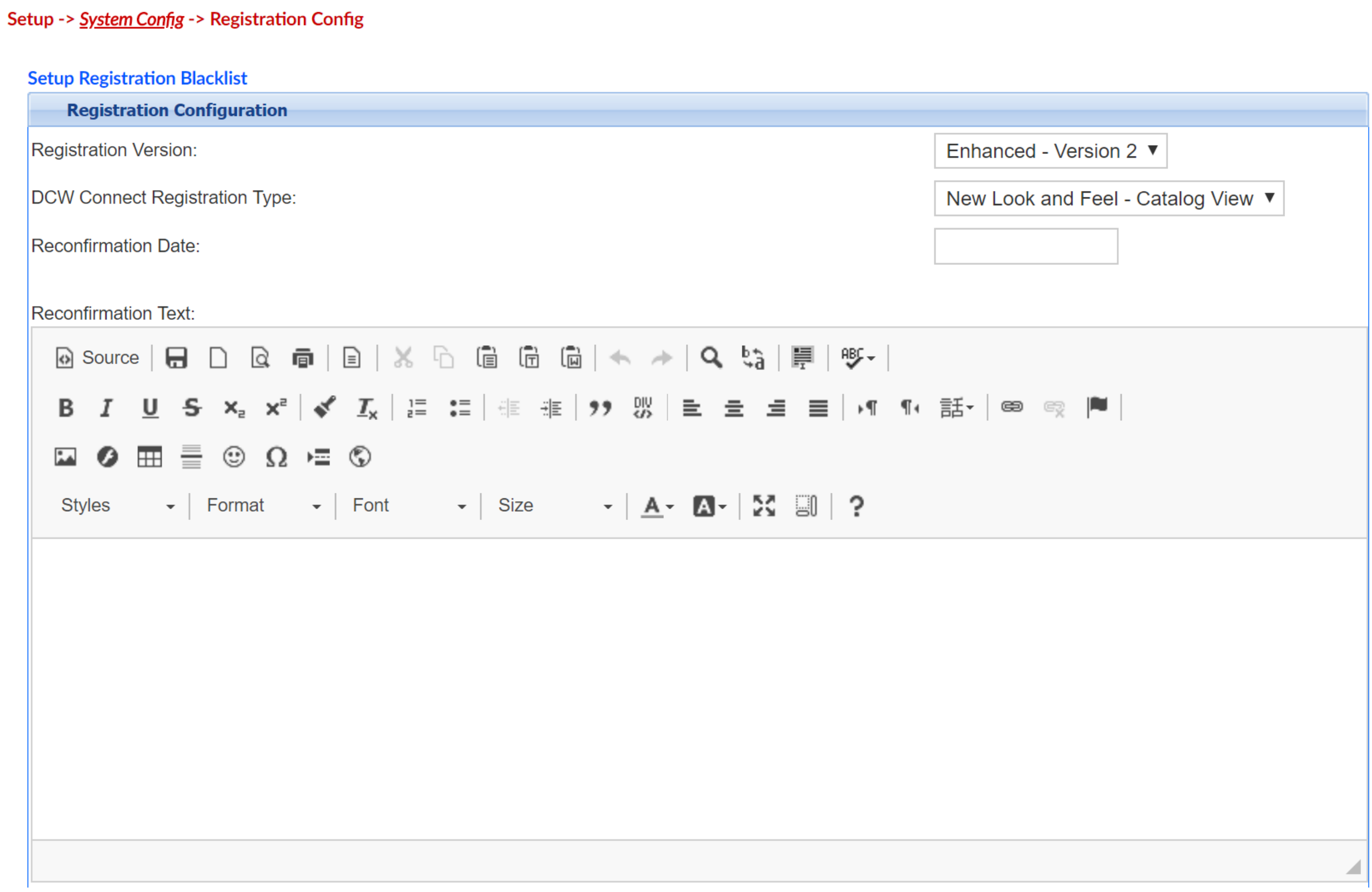


Then select Registration-



The first section contains the following items-

- Registration Version- this should always be set to Enhanced- Version 2 for the most up to date registration view.
- DCW Connect Registration Type- this should always be set to New Look and Feel- Catalog View for the most up to date registration view.
- Reconfirmation Date- set a day in the past that a parent should have reconfirmed their information by. This setting will force parents to confirm their detail is correct the next time the parent logs into the parent portal/connect portal.
- Reconfirmation Text- enter the text the parent should see when they will be updating/confirming detail is correct associated to the reconfirmation date.



Setup -> System Config -> Registration Config

Setup Registration Blacklist

Registration Configuration

Registration Version: Enhanced - Version 2

DCW Connect Registration Type: New Look and Feel - Catalog View

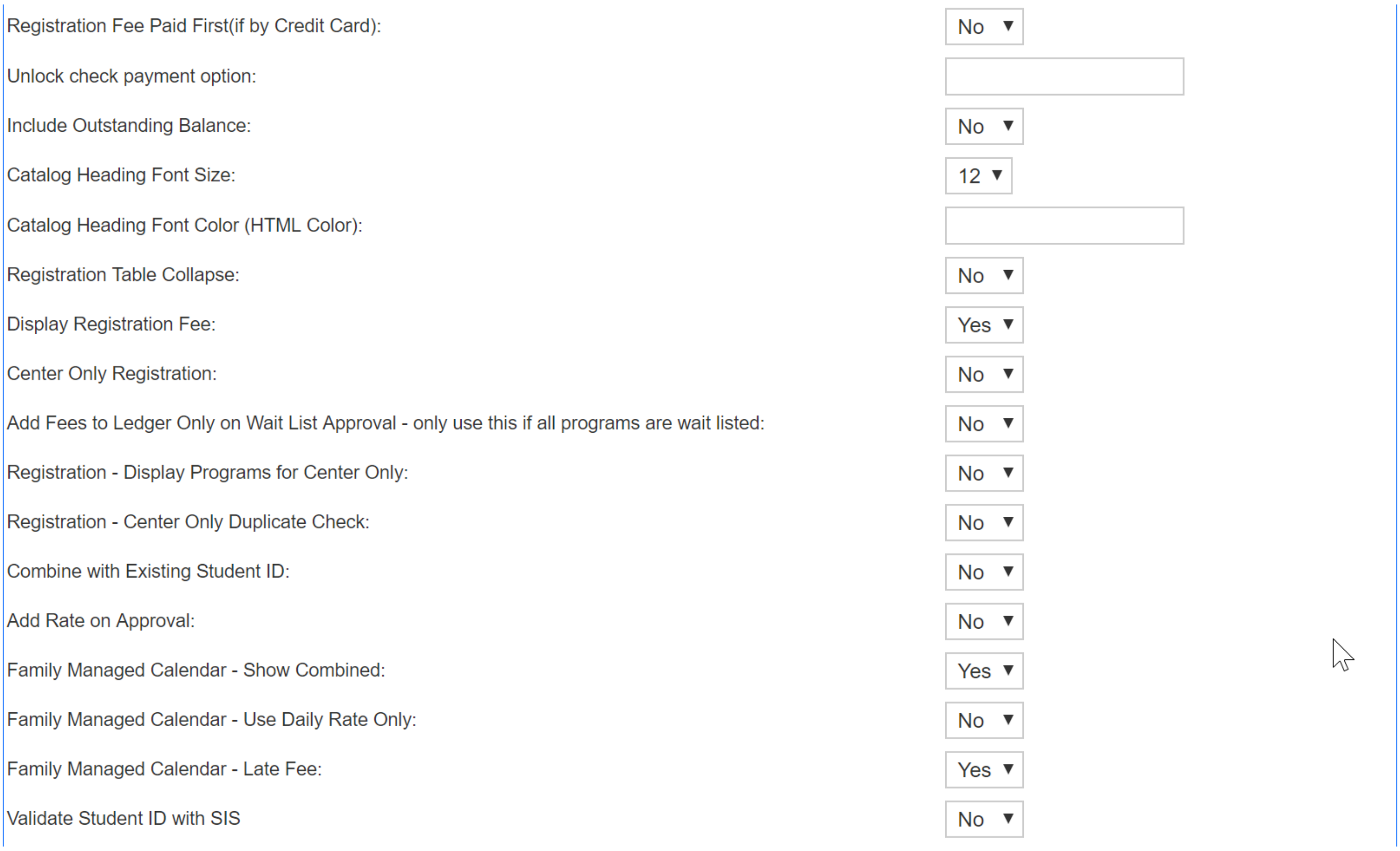
Reconfirmation Date:

Reconfirmation Text:

In the next section-

- Registration Fee Paid First (if by Credit Card)- will require parents to pay their registration fee before registration is completed.
- Unlock check payment option- enter a phrase in this field if you would like to allow parents the option to not pay by credit card during registration. The phrase in this field would need to be entered by a parent before trying to complete registration. If this phrase is used the balance in a parent's cart when registration is submitted will display on the family's financial ledger once approved.
- Include Outstanding Balance- Select YES if a parent's outstanding balance (credit or debit) should be included in the parent's total when completing registration- this will force a parent to pay an outstanding balance prior to signing up for another offering. If this field is set to NO the parent will just pay the balance associated with the programs currently in their cart.
- Catalog Heading Font Size- legacy registration option
- Catalog Heading Font Color (HTML Color)- legacy registration option
- Registration Table Collapse- legacy registration option

- Display Registration Fee- legacy registration option
- Center Only Registration-
- Add Fees to Ledger Only on Wait List Approval - only use this if all programs are waitlisted
- Registration - Display Programs for Center Only
- Registration - Center Only Duplicate Check
- Combine with Existing Student ID
- Add Rate on Approval
- Family Managed Calendar - Show Combined
- Family Managed Calendar - Use Daily Rate Only
- Family Managed Calendar - Late Fee
- Validate Student ID with SIS

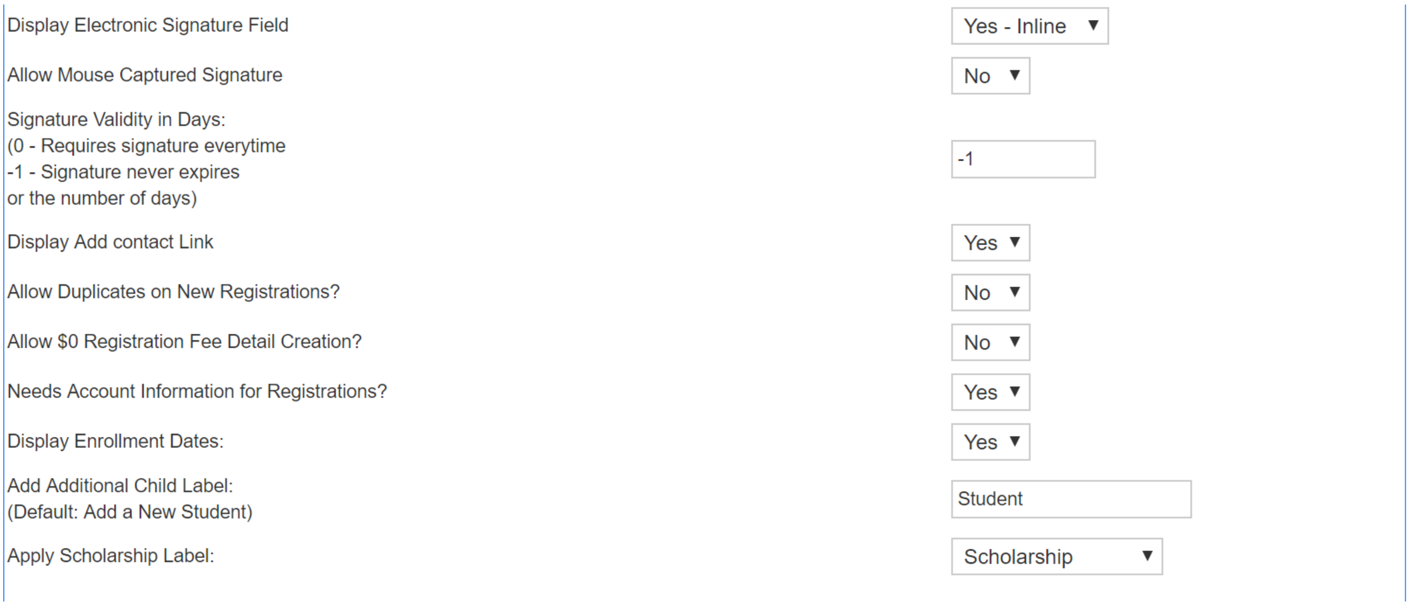


Registration Fee Paid First(if by Credit Card): No
Unlock check payment option:
Include Outstanding Balance: No
Catalog Heading Font Size: 12
Catalog Heading Font Color (HTML Color):
Registration Table Collapse: No
Display Registration Fee: Yes
Center Only Registration: No
Add Fees to Ledger Only on Wait List Approval - only use this if all programs are wait listed: No
Registration - Display Programs for Center Only: No
Registration - Center Only Duplicate Check: No
Combine with Existing Student ID: No
Add Rate on Approval: No
Family Managed Calendar - Show Combined: Yes
Family Managed Calendar - Use Daily Rate Only: No
Family Managed Calendar - Late Fee: Yes
Validate Student ID with SIS: No

In the next section-

- Display Electronic Signature Field- there are two different ways to collect this signature, In-Line and Pop-up. Changes made to this setting will apply to all registration pages.

- Allow Mouse Captured Signature- this option will allow for the capture of a mouse signature. If used with a touch screen, users can use a stylus or their finger to sign. If used with non-touch screen, users can use their mouse to sign.
- Signature Validity in Days: (0 - Requires signature everytime, -1 - Signature never expires or the number of days)
- Display Add contact Link
- Allow Duplicates on New Registrations?
- Allow $0 Registration Fee Detail Creation?
- Needs Account Information for Registrations?
- Display Enrollment Dates:
- Add Additional Child Label: (Default: Add a New Student)- detail placed here will overwrite the child label in the registration area.
- Apply Scholarship Label- allows users to select what to call a scholarship- scholarship or promotional code.



Display Electronic Signature Field	Yes - Inline ▼
Allow Mouse Captured Signature	No ▼
Signature Validity in Days: (0 - Requires signature everytime -1 - Signature never expires or the number of days)	-1
Display Add contact Link	Yes ▼
Allow Duplicates on New Registrations?	No ▼
Allow $0 Registration Fee Detail Creation?	No ▼
Needs Account Information for Registrations?	Yes ▼
Display Enrollment Dates:	Yes ▼
Add Additional Child Label: (Default: Add a New Student)	Student
Apply Scholarship Label:	Scholarship ▼

The next fields allow users to customize the registration look of the new registration and connect portal pages.

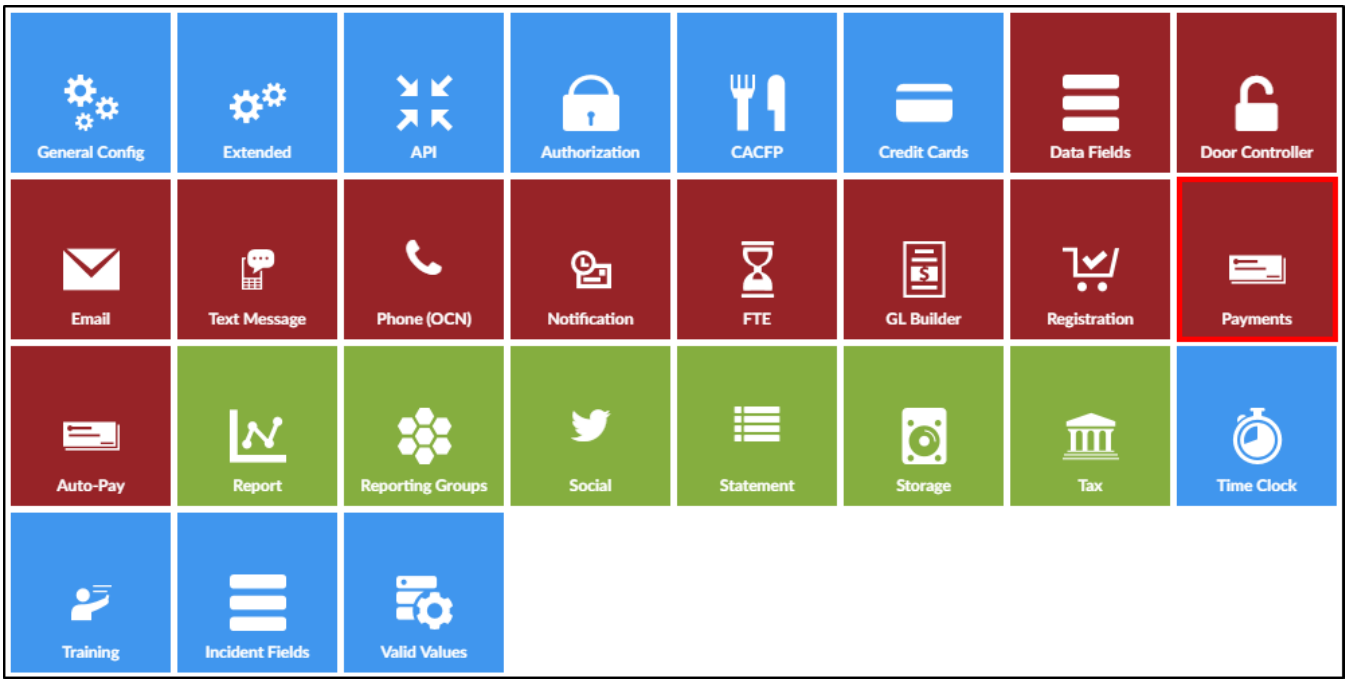
- Start Page Text: enter text and images parents should see when they first arrive at a registration page, you may want to include general contact information, pricing etc.
- Finishing Page Text: enter the information that will be displayed on the last page of registration

- Refund Policy: enter the refund policy in the Refund Policy text box. This will be displayed on the final page of registration for parents.
- Check Unlock Code Text: This text will appear if the Unlock Check Payment Option is entered and Pay First indicator is set to "Yes".
- Classroom Unlock Text: This text will appear if the unlock code is entered for the Classroom Semester.
- Capture Credit Card Text: enter the text that will appear after the online registration is captured by a credit card payment (this will mean the system will save a parent's credit card number once the parent has submitted their registration)
- Connect Portal Description: This will appear at the top of the Connect Portal Account Creation section on the registration checkout screen.
- Payment Information Description: This will appear at the top of the Payment Information section on the registration checkout screen.

System Config > Payments

Last Modified on 12/04/2018 9:59 am EST

1. From the Setup menu, select System Config, then click Payments



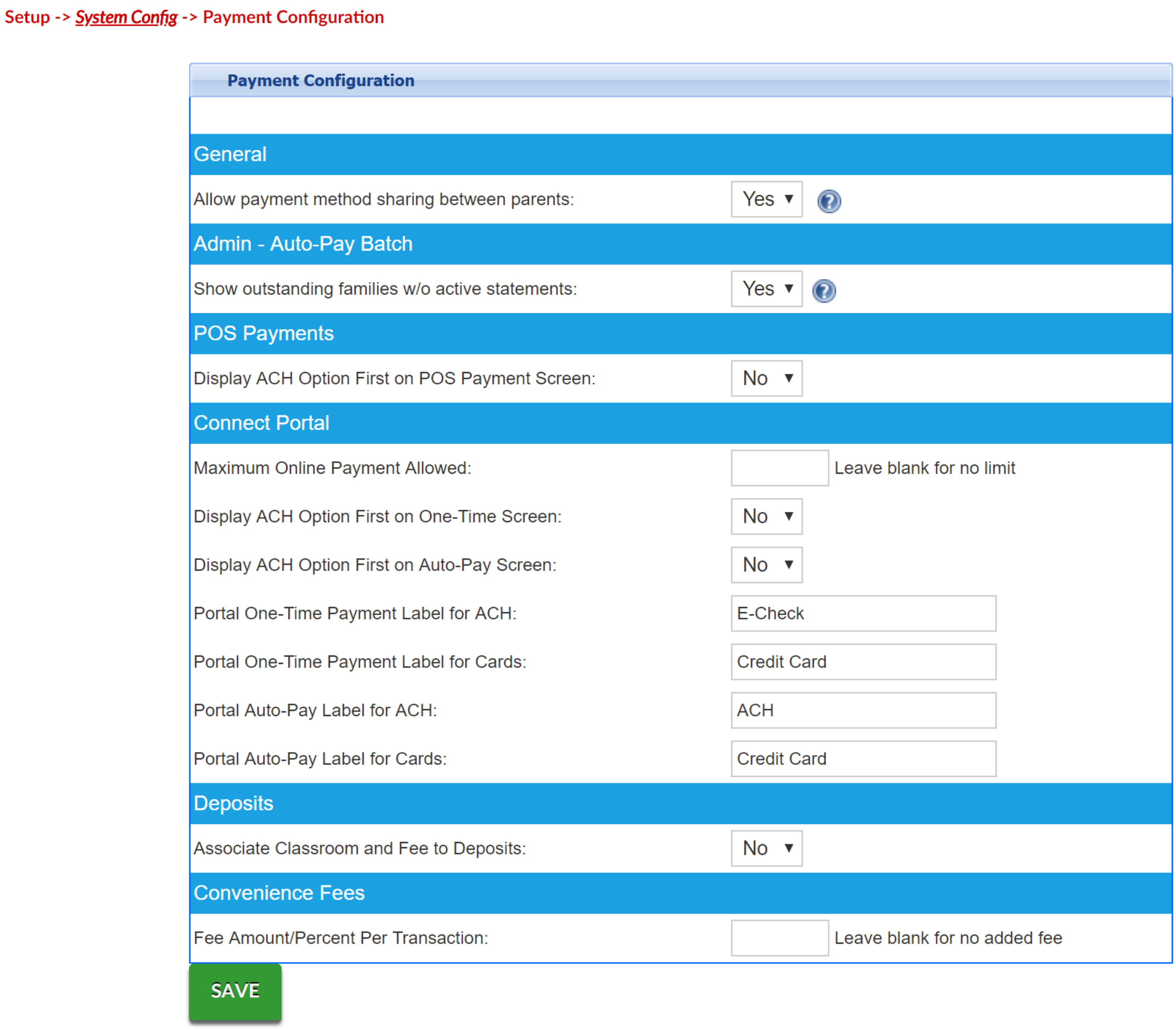
2. Complete necessary fields
    - Fee Amount/Percent Per Transaction -
    - Fee Transaction Type -
    - Charge Different Conv. Fee for ACH -
    - Fee Amount/Percent Per Transaction (ACH) -
    - Fee Transaction Type (ACH) -
    - Add Fee to One-Time Payments (Family-Entered) -
    - Add Fee to One-Time Payments (Staff-Entered) -
    - Add Fee to POS Payment

Available fields-

- Allow payment method sharing between parents- allows or disallows sharing of payment methods between non-split family parents. If a family is split the payment methods will NEVER be shared.
- Show outstanding families w/o active statements- this setting will mean that

even families who are not active will display on the autopay batch screen if they have an ACTIVE autopay method

- Display ACH Option First on POS Payment Screen- defaults ACH to display first on the payments > POS Payment screen (only used if a site is using a card swiper or check scanner to receipt payments)
- Maximum Online Payment Allowed- if a value is entered here it will ensure payments are not made over that threshold through the parent portal
- Display ACH Option First on One Time Payment Screen- if set to yes, ACH will display first when parents are trying to make a one time payment from theportal
- Display ACH Option First on AutoTime Payment Screen- if set to yes, ACH will display first when parents are setting up their autopay method
- Portal One-Time Payment Label for ACH- allows customization of the ACH label
- Portal One-Time Payment Label for Cards- allows customization of the credit card label
- Portal Auto-Pay Label for ACH- allows customization of the ACH label
- Portal Auto-Pay Label for Cards- allows customization of the credit card label
- Associate Classroom and Fee to Deposits
- Fee Amount/Percent Per Transaction- if a value is entered in this field additonal configuration options are displayed


Setup -> System Config -> Payment Configuration

Payment Configuration

General

Allow payment method sharing between parents: Yes

Admin - Auto-Pay Batch

Show outstanding families w/o active statements: Yes

POS Payments

Display ACH Option First on POS Payment Screen: No

Connect Portal

Maximum Online Payment Allowed: Leave blank for no limit

Display ACH Option First on One-Time Screen: No

Display ACH Option First on Auto-Pay Screen: No

Portal One-Time Payment Label for ACH: E-Check

Portal One-Time Payment Label for Cards: Credit Card

Portal Auto-Pay Label for ACH: ACH

Portal Auto-Pay Label for Cards: Credit Card

Deposits

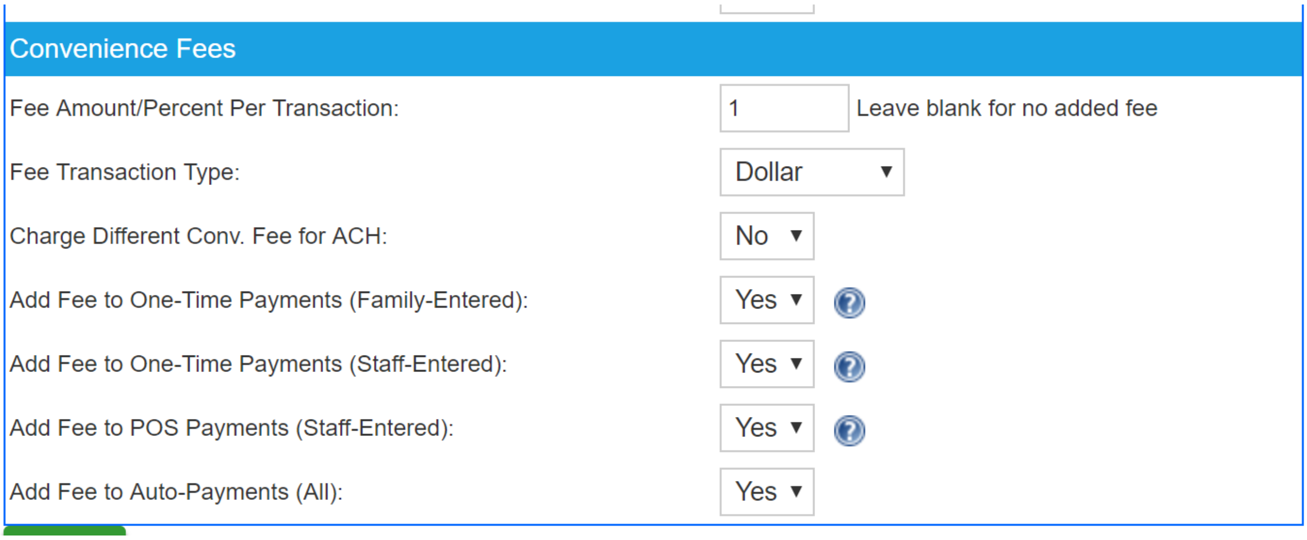
Associate Classroom and Fee to Deposits: No

Convenience Fees

Fee Amount/Percent Per Transaction: Leave blank for no added fee

Setting up Convenience Fees-

- Enter an amount in the Fee Amount/Percent Per Transaction field
- Choose if the fee transaction type is dollar or percentage
- Choose if there is a different fee for ACH payments, if yes- then enter the amount per transaction and if the type is dollar or percentage
- Add Fee to One-Time Payments (Family-Entered
- Add Fee to One-Time Payments (Staff-Entered)
- Add Fee to POS Payments (Staff-Entered)
- Add Fee to Auto-Payments (All)



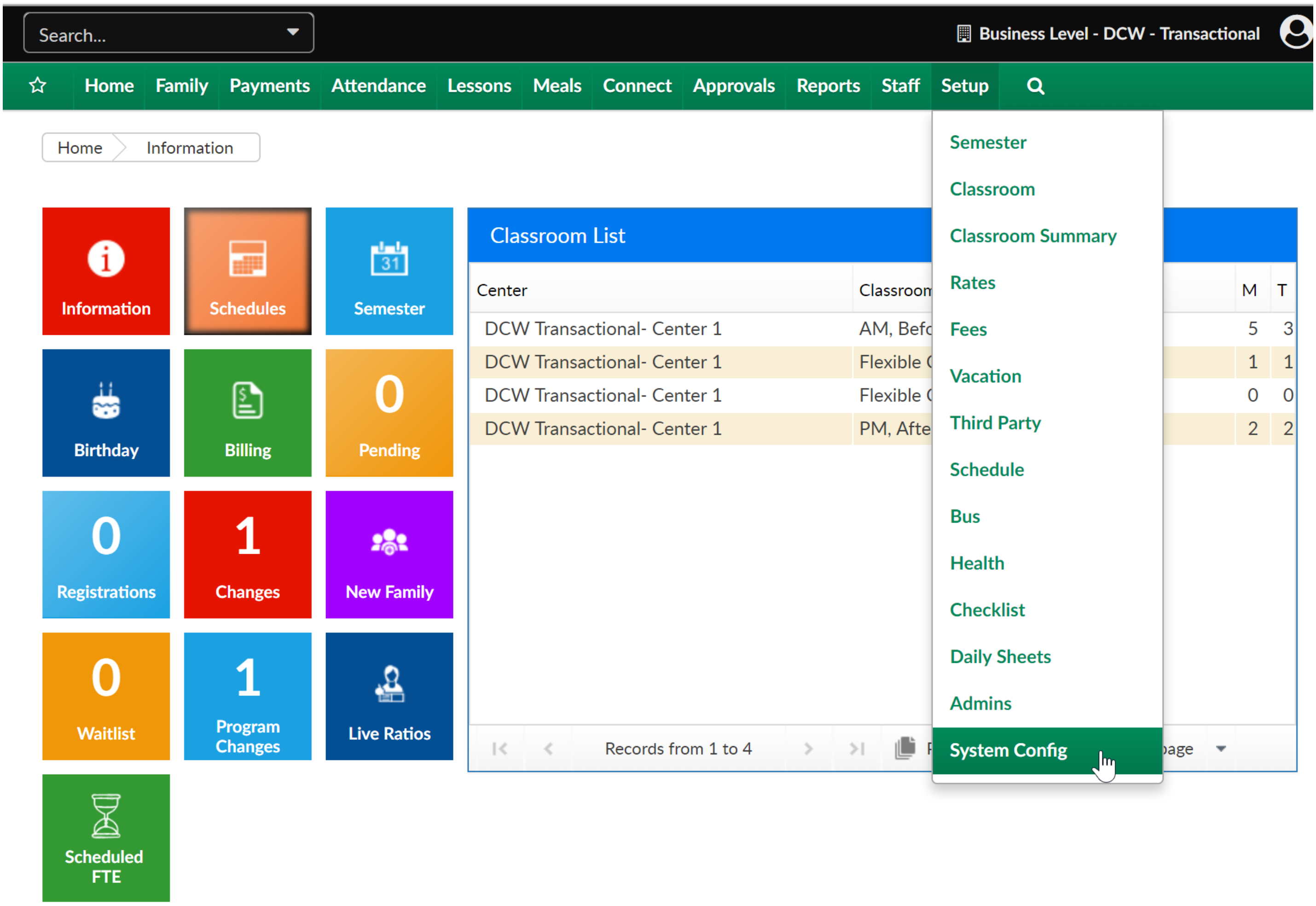
Convenience Fees

Fee Amount/Percent Per Transaction:	1 Leave blank for no added fee
Fee Transaction Type:	Dollar
Charge Different Conv. Fee for ACH:	No
Add Fee to One-Time Payments (Family-Entered):	Yes
Add Fee to One-Time Payments (Staff-Entered):	Yes
Add Fee to POS Payments (Staff-Entered):	Yes
Add Fee to Auto-Payments (All):	Yes

System Config >Auto-Pay

Last Modified on 05/21/2018 8:28 am EDT

From the Setup menu, select the System Config option.



Then select the Auto-Pay tile

Setup -> System Config

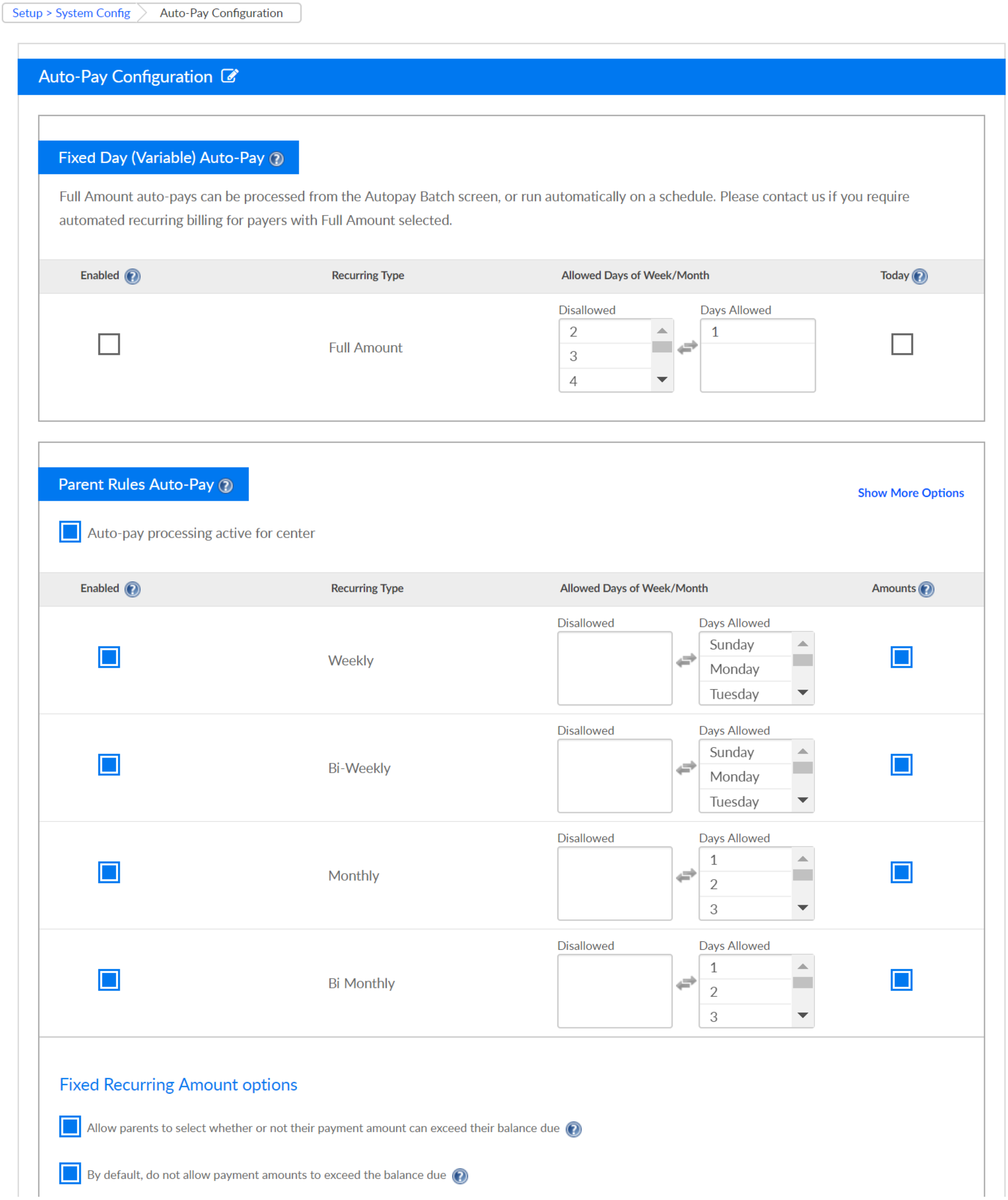
Fixed Day (Variable) Auto-Pay- select this option if you want to be able to manually run your family's autopayments from the payment > autopay screen.

- Select this option by checking the box under the enabled label
- Select the day(s) parents are allowed to select by moving days from the disallowed to the days allowed field. This can be done by double clicking on the day.
- Select the today box if families will be allowed to add autopays the same day as the days allowed.
  - This means a family could enter autopay detail on the first, to be effective the same day.

Parent Rules Auto-Pay- select this option if you would like the system to automatically batch family's payments. Once this option is selected submit a ticket to care@cirrusgroup.com to request the autopay batch be setup and turned on.

- Select this option by checking the box under the enabled label
- Payments can be allowed to be entered:
  - Weekly- occuring 1 time per week
  - Bi-Weekly- appearing or taking place every two weeks or twice a week.

    - Monthly- occuring 1 time a month
    - Bi-Monthly-occurring or produced twice a month or every two months.
- Select the day(s) parents are allowed to select by moving days from the disallowed to the days allowed field. This can be done by double clicking on the day.
- If parents should be allowed to enter a specific fixed amount to pay automatially, select the amounts box.
    - *Fixed Recurring Amount options*
        - Allow parents to select whether or not their payment amount can exceed their balance due
        - By default, do not allow payment amounts to exceed the balance due



Auto-Pay Configuration

Fixed Day (Variable) Auto-Pay

Full Amount auto-pays can be processed from the Autopay Batch screen, or run automatically on a schedule. Please contact us if you require automated recurring billing for payers with Full Amount selected.

Enabled	Recurring Type	Allowed Days of Week/Month		Today
		Disallowed	Days Allowed	
☐	Full Amount	2 3 4	1	☐

Parent Rules Auto-Pay

☑ Auto-pay processing active for center

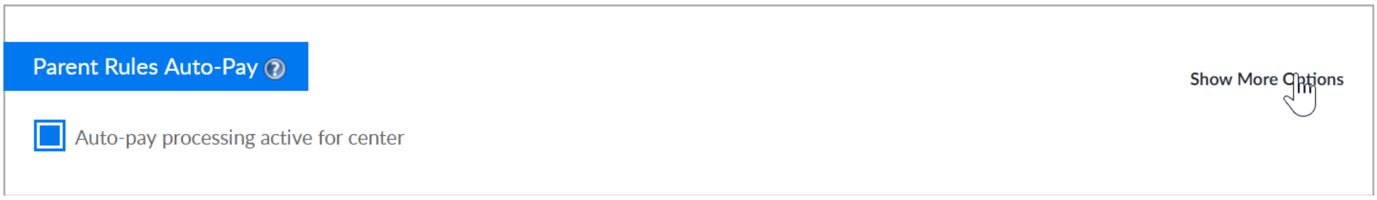
Enabled	Recurring Type	Allowed Days of Week/Month		Amounts
		Disallowed	Days Allowed	
☑	Weekly		Sunday Monday Tuesday	☑
☑	Bi-Weekly		Sunday Monday Tuesday	☑
☑	Monthly		1 2 3	☑
☑	Bi Monthly		1 2 3	☑

Fixed Recurring Amount options

☑ Allow parents to select whether or not their payment amount can exceed their balance due

☑ By default, do not allow payment amounts to exceed the balance due

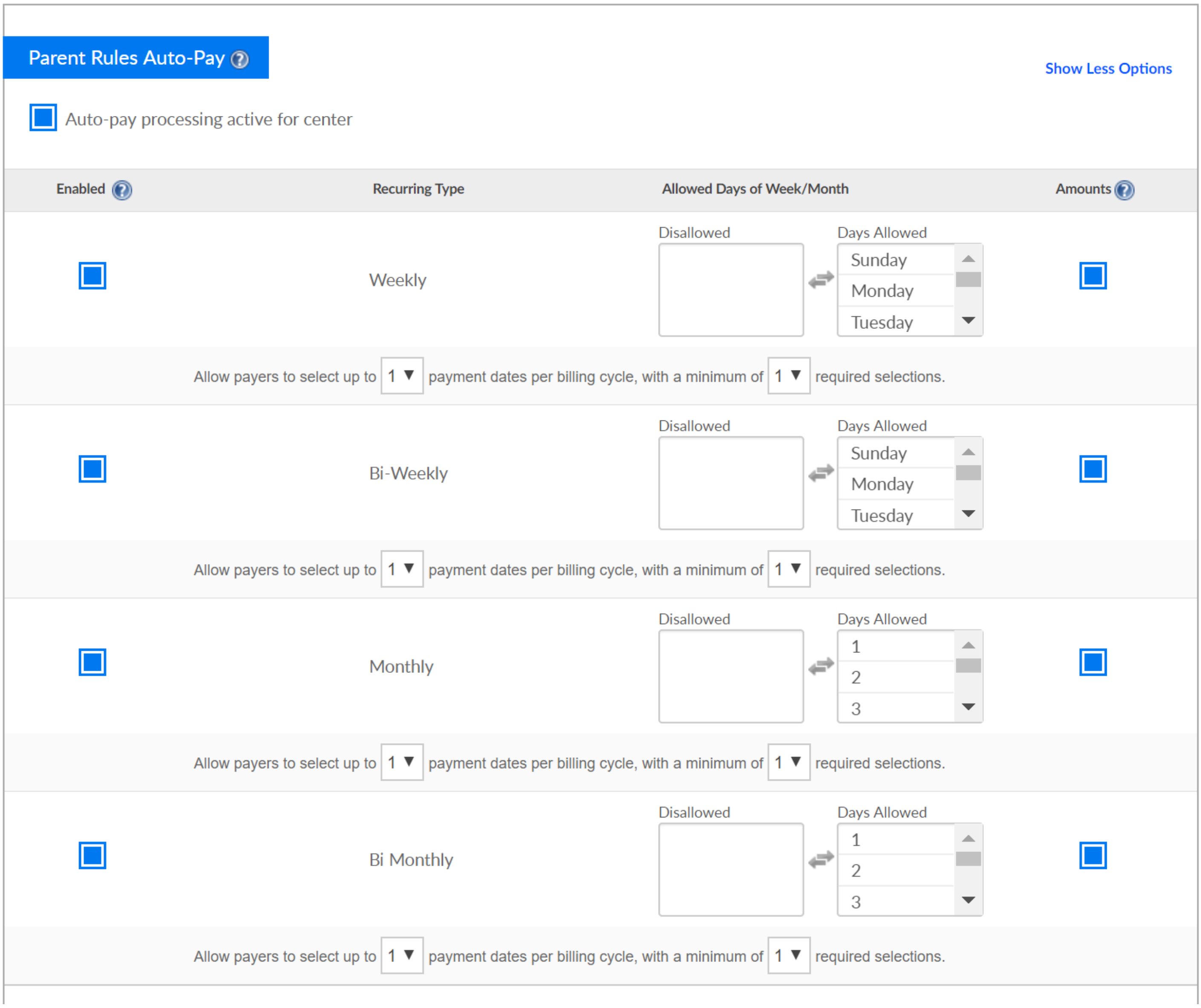
Select the Show More Options link to display additonal configuration options for Parent Rules Auto-Pay-



Parent Rules Auto-Pay

☑ Auto-pay processing active for center

These additonal options allow parents to make additonal selections during the autopay setup process.



Parent Rules Auto-Pay

☑ Auto-pay processing active for center

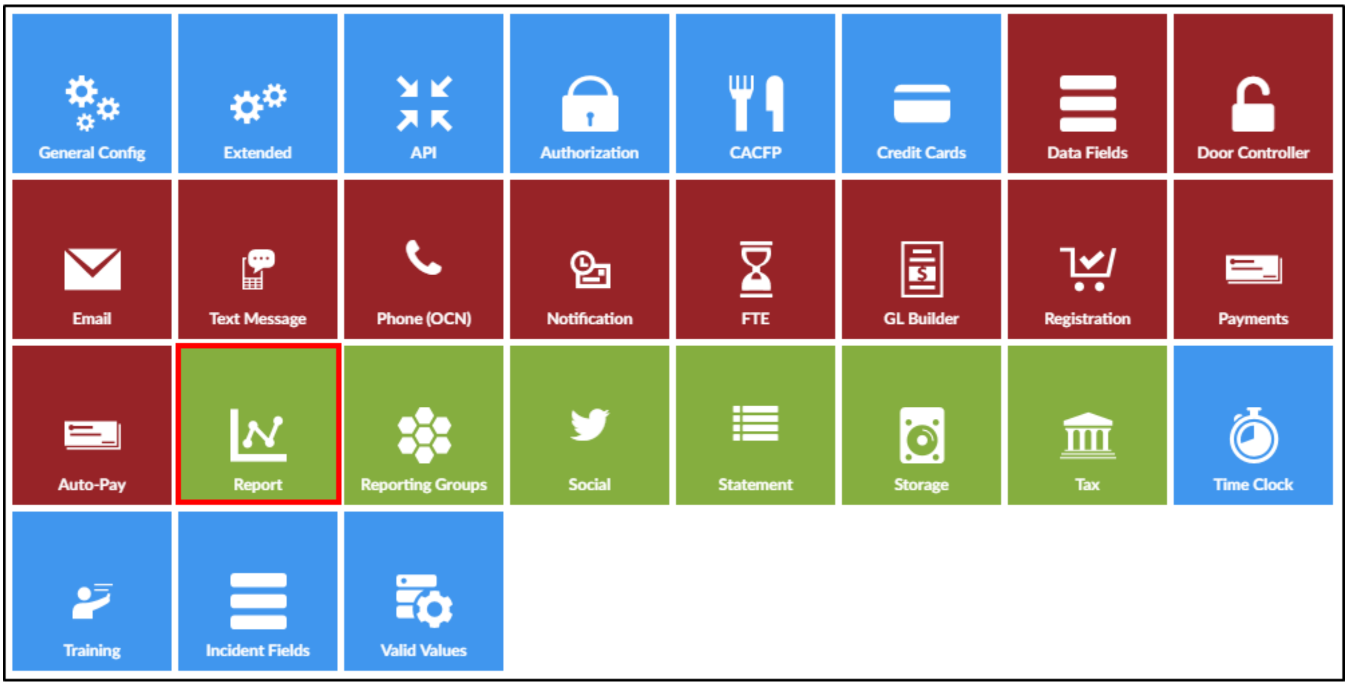
Enabled	Recurring Type	Allowed Days of Week/Month	Amounts
☑	Weekly	Disallowed: (none) Days Allowed: Sunday, Monday, Tuesday	☑
Allow payers to select up to 1 ▼ payment dates per billing cycle, with a minimum of 1 ▼ required selections.			
☑	Bi-Weekly	Disallowed: (none) Days Allowed: Sunday, Monday, Tuesday	☑
Allow payers to select up to 1 ▼ payment dates per billing cycle, with a minimum of 1 ▼ required selections.			
☑	Monthly	Disallowed: (none) Days Allowed: 1, 2, 3	☑
Allow payers to select up to 1 ▼ payment dates per billing cycle, with a minimum of 1 ▼ required selections.			
☑	Bi Monthly	Disallowed: (none) Days Allowed: 1, 2, 3	☑
Allow payers to select up to 1 ▼ payment dates per billing cycle, with a minimum of 1 ▼ required selections.			

System Config > Report

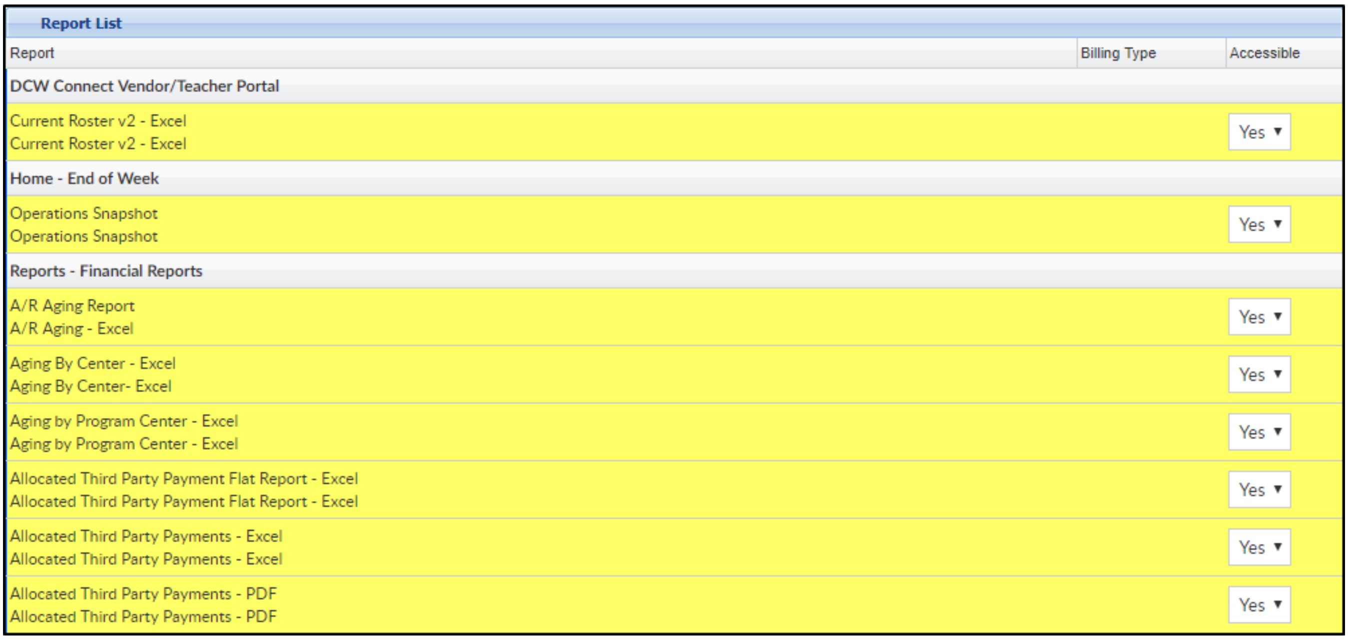
Last Modified on 10/22/2018 9:50 am EDT

The System Config > Report screen allows administrators to choose which reports will be available within the system for all users.

1. Select Setup from the menu, click System Config. Then select the Report option



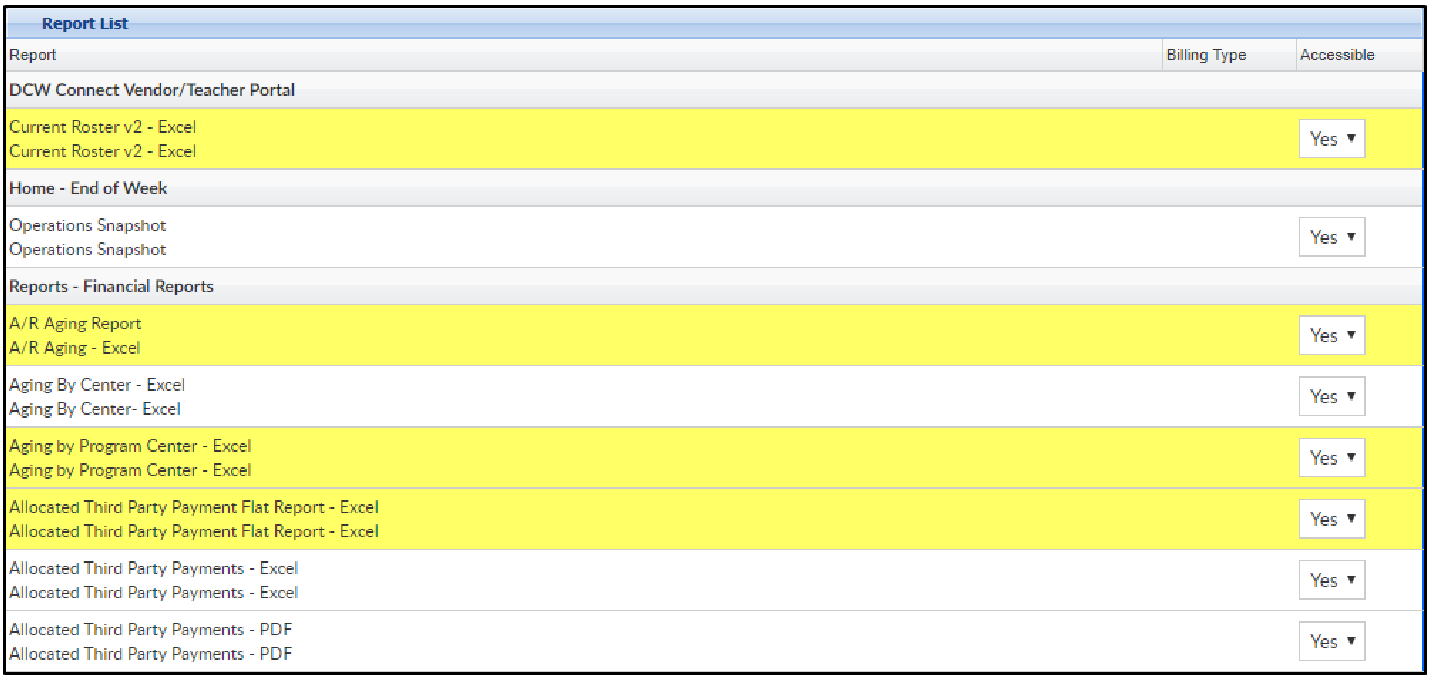
2. On the Report List, select Yes for the report to be available for all users or No to turn the report off, then click Save



Report List

Report	Billing Type	Accessible
DCW Connect Vendor/Teacher Portal		
Current Roster v2 - Excel Current Roster v2 - Excel		Yes ▾
Home - End of Week		
Operations Snapshot Operations Snapshot		Yes ▾
Reports - Financial Reports		
A/R Aging Report A/R Aging - Excel		Yes ▾
Aging By Center - Excel Aging By Center- Excel		Yes ▾
Aging by Program Center - Excel Aging by Program Center - Excel		Yes ▾
Allocated Third Party Payment Flat Report - Excel Allocated Third Party Payment Flat Report - Excel		Yes ▾
Allocated Third Party Payments - Excel Allocated Third Party Payments - Excel		Yes ▾
Allocated Third Party Payments - PDF Allocated Third Party Payments - PDF		Yes ▾

Please Note: The first time you navigate to the screen all report lines will be yellow, this means that custom settings have not been set yet. Once the page is saved, lines will be white. As new reports are added, they will display as yellow. See example below



Report List

Report	Billing Type	Accessible
DCW Connect Vendor/Teacher Portal		
Current Roster v2 - Excel Current Roster v2 - Excel		Yes ▼
Home - End of Week		
Operations Snapshot Operations Snapshot		Yes ▼
Reports - Financial Reports		
A/R Aging Report A/R Aging - Excel		Yes ▼
Aging By Center - Excel Aging By Center- Excel		Yes ▼
Aging by Program Center - Excel Aging by Program Center - Excel		Yes ▼
Allocated Third Party Payment Flat Report - Excel Allocated Third Party Payment Flat Report - Excel		Yes ▼
Allocated Third Party Payments - Excel Allocated Third Party Payments - Excel		Yes ▼
Allocated Third Party Payments - PDF Allocated Third Party Payments - PDF		Yes ▼

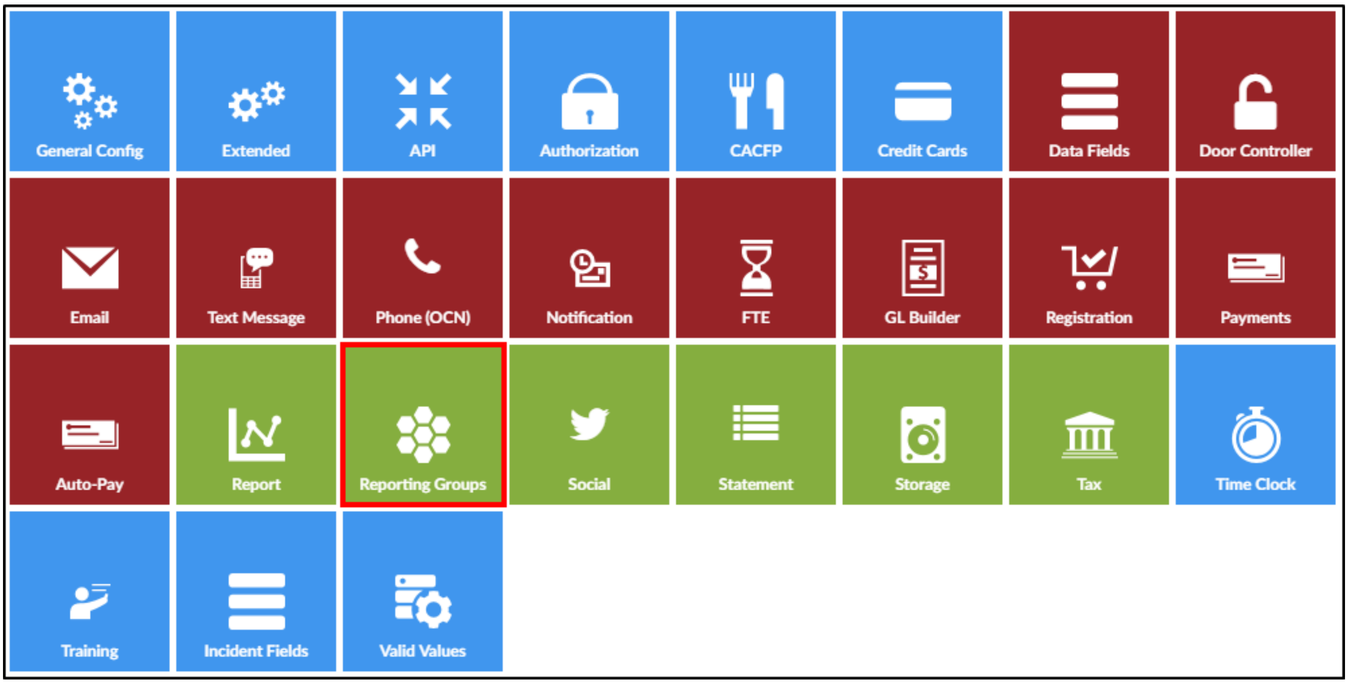
System Config > Reporting Groups

Last Modified on 01/11/2019 8:02 am EST

Reporting Groups allows for site administrators and staff to group families together that need to be tracked for outstanding balances.

Adding a New Reporting Category

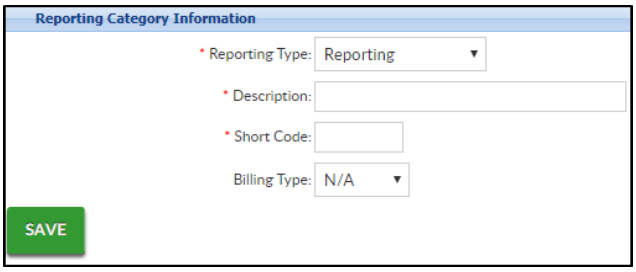
1. Click Setup from the menu. Select System Config, then choose Reporting Groups



2. Reporting Type - select a reporting type from the drop-down list
    - Reporting - use this option if the group will associate families together for billing
    - Payment Reporting - this option is used for grouping families together based on payments
    - Student - use this option if the group is used to assign children
3. Description - enter the name of the reporting group
4. Short Code - enter the abbreviated name for the reporting category
5. Billing Type - if the reporting group is associated to a billing cycle, select from the drop-down list
    - Weekly - choose this option if the billing cycle is based on a weekly basis. Families associated with this reporting category will be billed when transactional billing is process for weekly

    - Monthly - use this if the billing cycle is based on a monthly basis. Families associated with this reporting category will be billed when the transactional billing is processed for monthly

6. Click Save


Reporting Category Information

* Reporting Type: Reporting

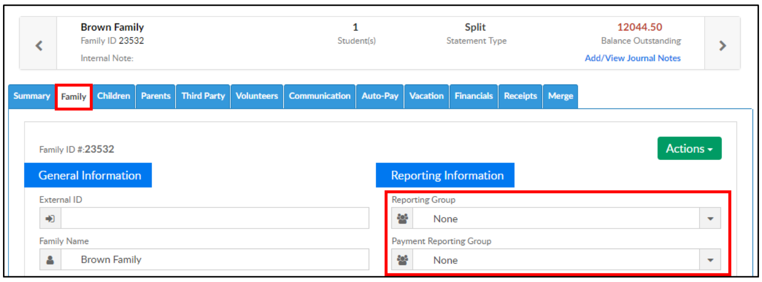
* Description:

* Short Code:

Billing Type: N/A

Assigning a Reporting Group

1. To assign a reporting group, locate the family's record
    - To assign a group to a Family, navigate to the family tab to assign payment or the reporting group options


Brown Family

Family ID 23532

Internal Note:

1 Student(s)

Split Statement Type

12044.50 Balance Outstanding

Family ID #:23532

General Information

External ID:

Family Name: Brown Family

Reporting Information

Reporting Group: None

Payment Reporting Group: None

    - To assign a group to a Student, navigate to the Children tab
    - Scroll to the bottom and locate the Student Reporting Group drop-down. **Please Note:** This option <u>will not</u> be there if there is no Student reporting group setup
    - Choose the reporting group

2. Click Save

Reporting Group Reports

The below reports can be used to view the "Reporting" type of Reporting Groups:

- Category/Program Trend Report (Reports > Program)
- Outstanding Balance (Reports > Payments or Payments>Outstanding - may require additional search criteria in order to process report at business level)
- Batch and Report (Reports > Payment - shows all transaction information for the

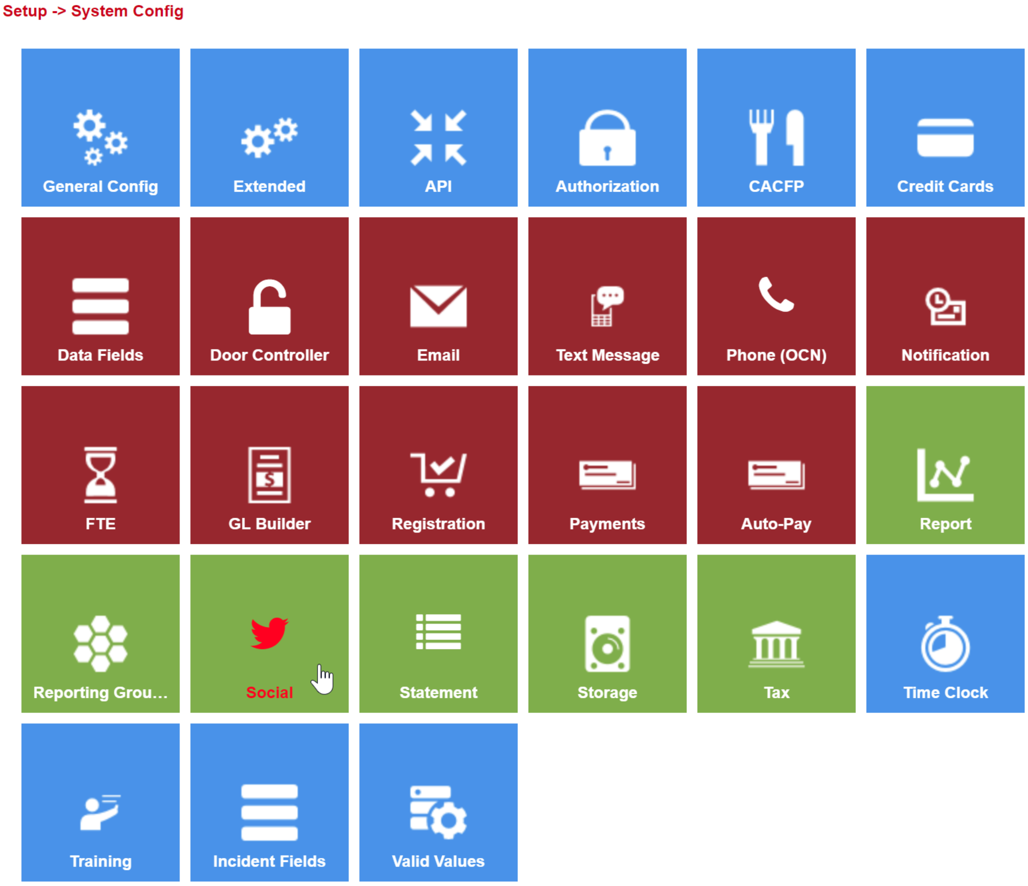
facility)

- Meal Counts (Reports > Child)
- Age Range (Reports > Child)
- Parent Payment Reporting Group - Excel (Reports> Financial - generates a report for families with "Bankruptcy", "Collections", or "Good Standing" reporting group types)
- Family Status Tracking - Excel (Reports > Room/Program - includes both Reporting Group and Payment Reporting Group in report)

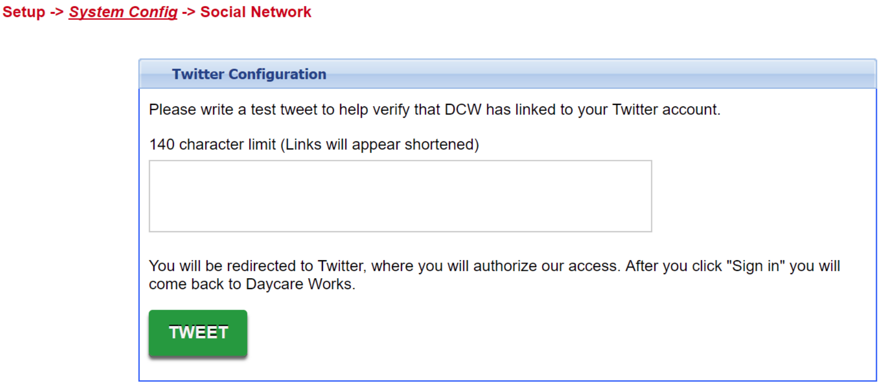
System Config > Social

Last Modified on 12/11/2017 2:51 pm EST

From the setup > system config drop down menu, select the Social option.



On the Social screen enter a test Tweet.



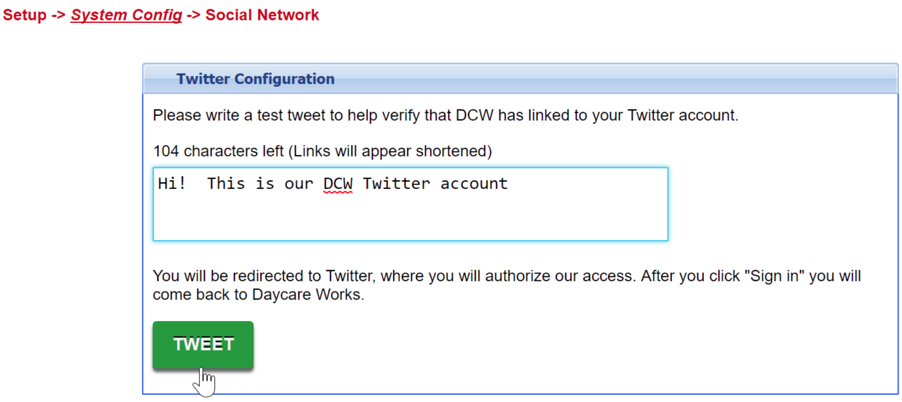
Twitter Configuration

Please write a test tweet to help verify that DCW has linked to your Twitter account.

140 character limit (Links will appear shortened)

You will be redirected to Twitter, where you will authorize our access. After you click "Sign in" you will come back to Daycare Works.

Enter text, then press TWEET- whatever text is typed here will display on the feed of the linked account once authorization is completed.


Setup -> *System Config* -> Social Network

Twitter Configuration

Please write a test tweet to help verify that DCW has linked to your Twitter account.

104 characters left (Links will appear shortened)

```
Hi!  This is our DCW Twitter account
```

You will be redirected to Twitter, where you will authorize our access. After you click "Sign in" you will come back to Daycare Works.

The screen will take you to the authorization option, select Authorize App to begin using your Twitter account with the system. After authorizing the screen will autodirect back to the Social screen.


Authorize Daycare Works to use your account?

Daycare Works
By Cirrus Group LLC
www.daycareworks.com
Communication module for Daycare Works and Cirrus Works Online suite of applications

This application will be able to:

- Read Tweets from your timeline.
- See who you follow, and follow new people.
- Update your profile.
- Post Tweets for you.

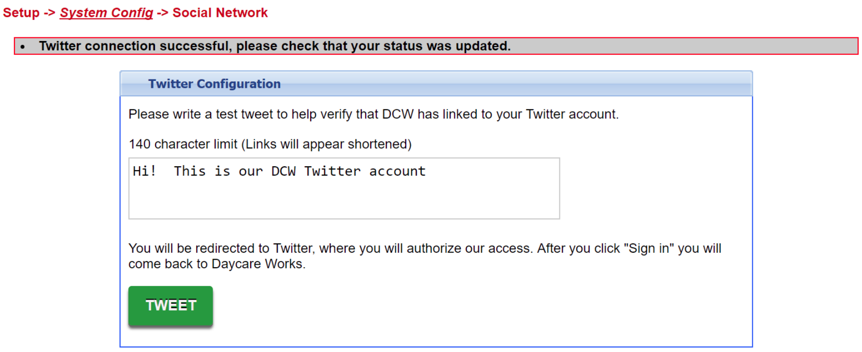
Will not be able to:

- Access your direct messages.
- See your email address.
- See your Twitter password.

You can revoke access to any application at any time from the Applications tab of your Settings page.

By authorizing an application you continue to operate under Twitter's Terms of Service. In particular, some usage information will be shared back with Twitter. For more, see our Privacy Policy.

A confirmation box will appear- the Twitter account has been linked.


Setup -> *System Config* -> Social Network

- **Twitter connection successful, please check that your status was updated.**

Twitter Configuration

Please write a test tweet to help verify that DCW has linked to your Twitter account.

140 character limit (Links will appear shortened)

```
Hi!  This is our DCW Twitter account
```

You will be redirected to Twitter, where you will authorize our access. After you click "Sign in" you will come back to Daycare Works.

The test message will display on the Twitter Feed-

Kristina @KGDCW · 4m

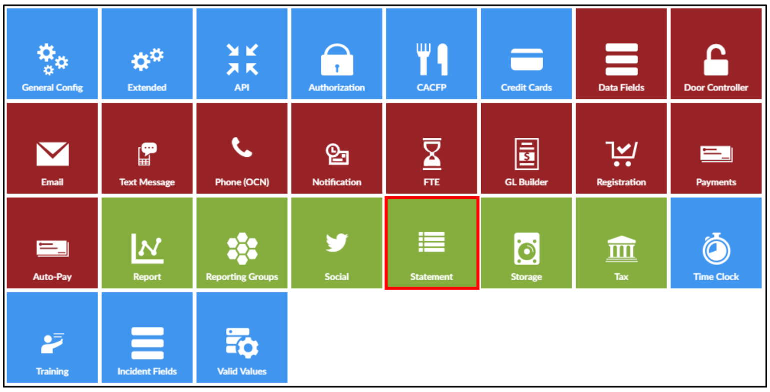
Hi! This is our DCW Twitter account

System Config > Statement

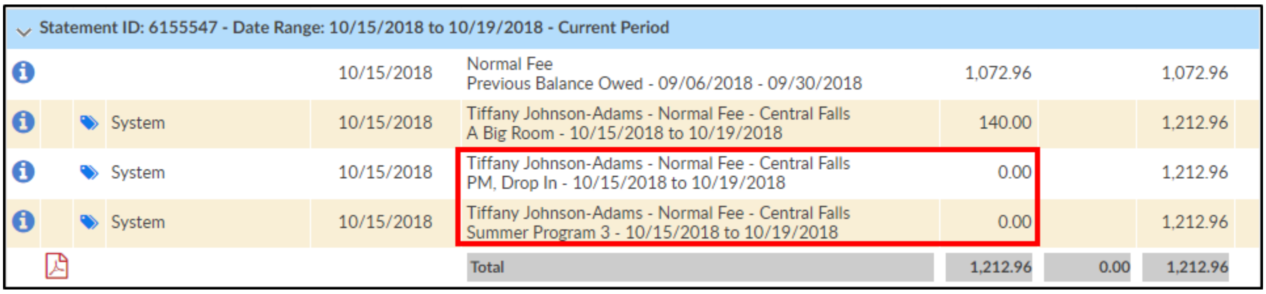
Last Modified on 12/04/2018 9:55 am EST

The System Config > Statement screens allows administrators to change what is displayed on the Family's Financials tab and the billing statement.

1. From the Setup > System Config menu, select Statement



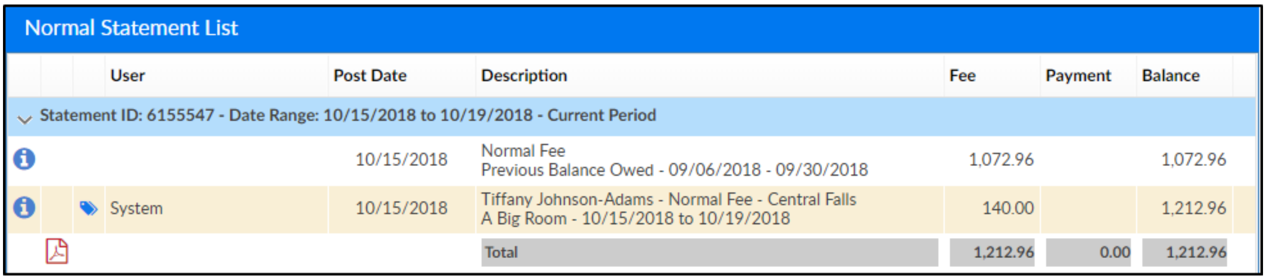
2. For each configuration option, choose Yes or No to have the option displayed or not displayed. Please Note: Some of these options will also change the Family's Financial tab Statement List
3. Display Birth Date on Statement
4. Display Zero Dollar Fees
    - Yes - show items with zero dollar fees



Statement ID: 6155547 - Date Range: 10/15/2018 to 10/19/2018 - Current Period

ⓘ		10/15/2018	Normal Fee Previous Balance Owed - 09/06/2018 - 09/30/2018	1,072.96		1,072.96
ⓘ	System	10/15/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls A Big Room - 10/15/2018 to 10/19/2018	140.00		1,212.96
ⓘ	System	10/15/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls PM, Drop In - 10/15/2018 to 10/19/2018	0.00		1,212.96
ⓘ	System	10/15/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls Summer Program 3 - 10/15/2018 to 10/19/2018	0.00		1,212.96
			Total	1,212.96	0.00	1,212.96

    - No - do not show zero dollar fee items

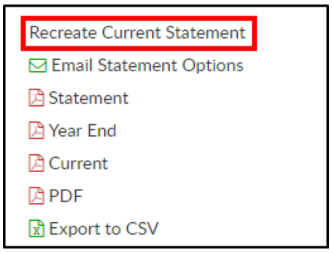


Normal Statement List

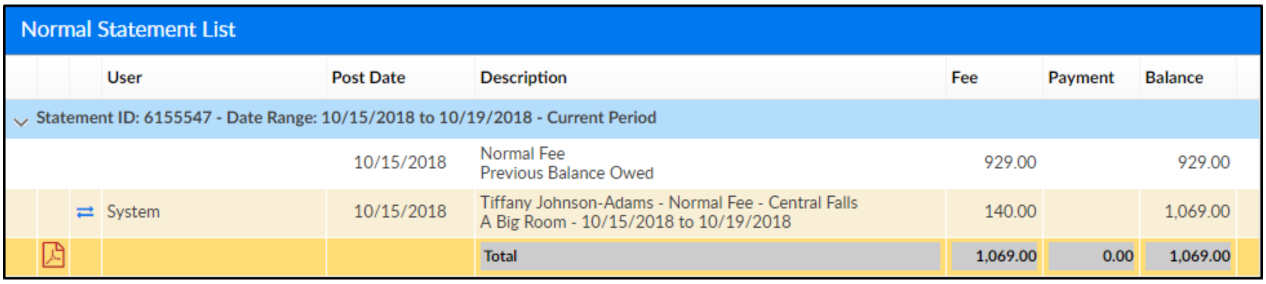
	User	Post Date	Description	Fee	Payment	Balance
Statement ID: 6155547 - Date Range: 10/15/2018 to 10/19/2018 - Current Period						
ⓘ		10/15/2018	Normal Fee Previous Balance Owed - 09/06/2018 - 09/30/2018	1,072.96		1,072.96
ⓘ	System	10/15/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls A Big Room - 10/15/2018 to 10/19/2018	140.00		1,212.96
			Total	1,212.96	0.00	1,212.96

5. Display Discounts as Credits
6. Display Original Amount
    - Yes - show outstanding balance on current statement

    - No - only show current balance on current statement
7. Display Amount Allocated
8. Display Due Date
    - Yes - display the due date on the statement
    - No - do not display the due date
9. Allow Payments & Fees to be Edited
    - Yes - payments and fees can be edited on the Family's Financial tab
    - No - payments and fees cannot be edited on the Financial tab
10. Allow Statement Details to be Deleted
    - Yes - allow details to be deleted from the Financials tab
    - No - do not allow details to be deleted from the Financials tab
11. Show Detail Post Date
12. Allow Family Statement Recreate
    - Yes - allow statements to be recreated. This option is under the Action menu on the Financials tab



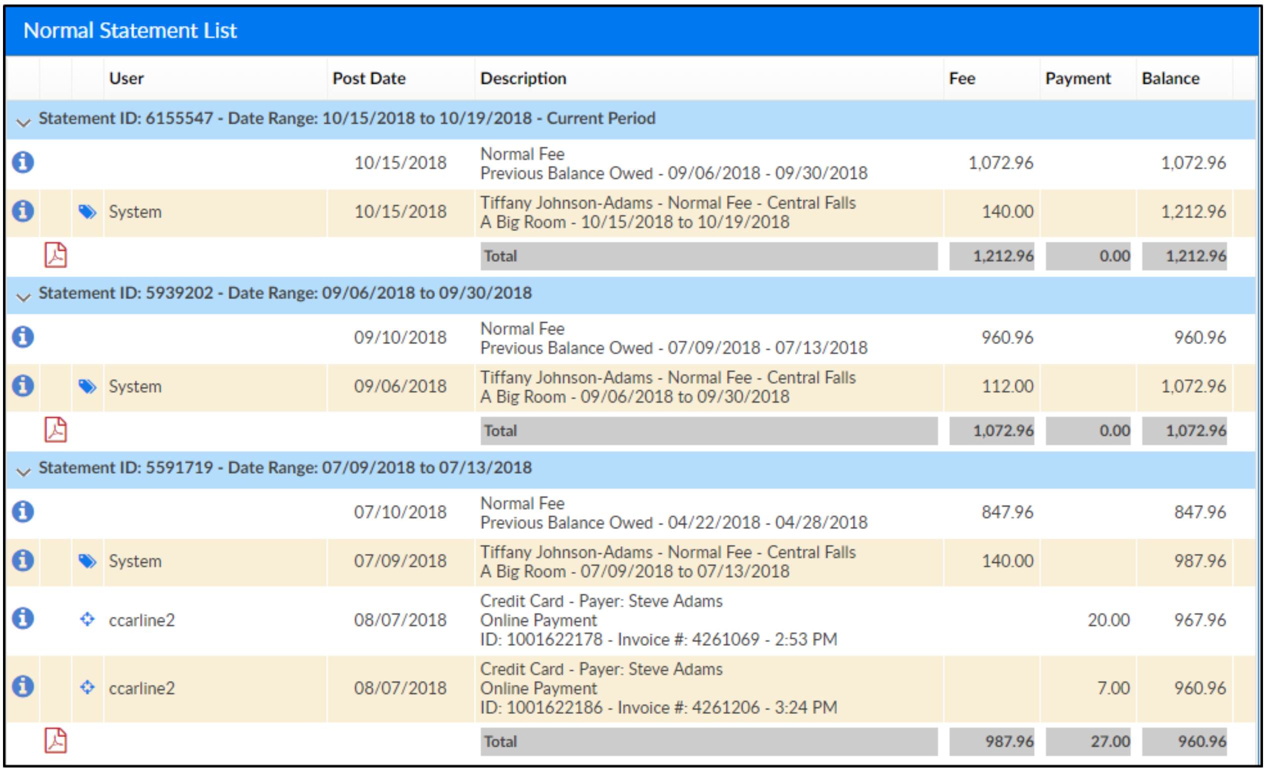
    - No - do not allow statements to be recreated. The option is removed from the Actions menu on the financials tab
13. Display Prepaid Deposits
14. Use Business Level Address for Year End Statements
15. Number of Periods to Display on Family Statement. See examples below
    - Example of 1 period on the statement



Normal Statement List

		User	Post Date	Description	Fee	Payment	Balance
Statement ID: 6155547 - Date Range: 10/15/2018 to 10/19/2018 - Current Period							
			10/15/2018	Normal Fee Previous Balance Owed	929.00		929.00
	⇄	System	10/15/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls A Big Room - 10/15/2018 to 10/19/2018	140.00		1,069.00
				Total	1,069.00	0.00	1,069.00

    - Example of 3 periods on the statement



Normal Statement List

User	Post Date	Description	Fee	Payment	Balance
Statement ID: 6155547 - Date Range: 10/15/2018 to 10/19/2018 - Current Period					
	10/15/2018	Normal Fee Previous Balance Owed - 09/06/2018 - 09/30/2018	1,072.96		1,072.96
System	10/15/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls A Big Room - 10/15/2018 to 10/19/2018	140.00		1,212.96
		Total	1,212.96	0.00	1,212.96
Statement ID: 5939202 - Date Range: 09/06/2018 to 09/30/2018					
	09/10/2018	Normal Fee Previous Balance Owed - 07/09/2018 - 07/13/2018	960.96		960.96
System	09/06/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls A Big Room - 09/06/2018 to 09/30/2018	112.00		1,072.96
		Total	1,072.96	0.00	1,072.96
Statement ID: 5591719 - Date Range: 07/09/2018 to 07/13/2018					
	07/10/2018	Normal Fee Previous Balance Owed - 04/22/2018 - 04/28/2018	847.96		847.96
System	07/09/2018	Tiffany Johnson-Adams - Normal Fee - Central Falls A Big Room - 07/09/2018 to 07/13/2018	140.00		987.96
ccarline2	08/07/2018	Credit Card - Payer: Steve Adams Online Payment ID: 1001622178 - Invoice #: 4261069 - 2:53 PM		20.00	967.96
ccarline2	08/07/2018	Credit Card - Payer: Steve Adams Online Payment ID: 1001622186 - Invoice #: 4261206 - 3:24 PM		7.00	960.96
		Total	987.96	27.00	960.96

16. Print Statements By
    - Family
    - Guardian
17. Family Statement Display
    - Normal
    - Flat Detail
    - Version 2
    - Version 2 - Due Date
    - Version 3
18. Statement Footer - enter text to display on the bottom of statements
19. Year End Tax Statement Service

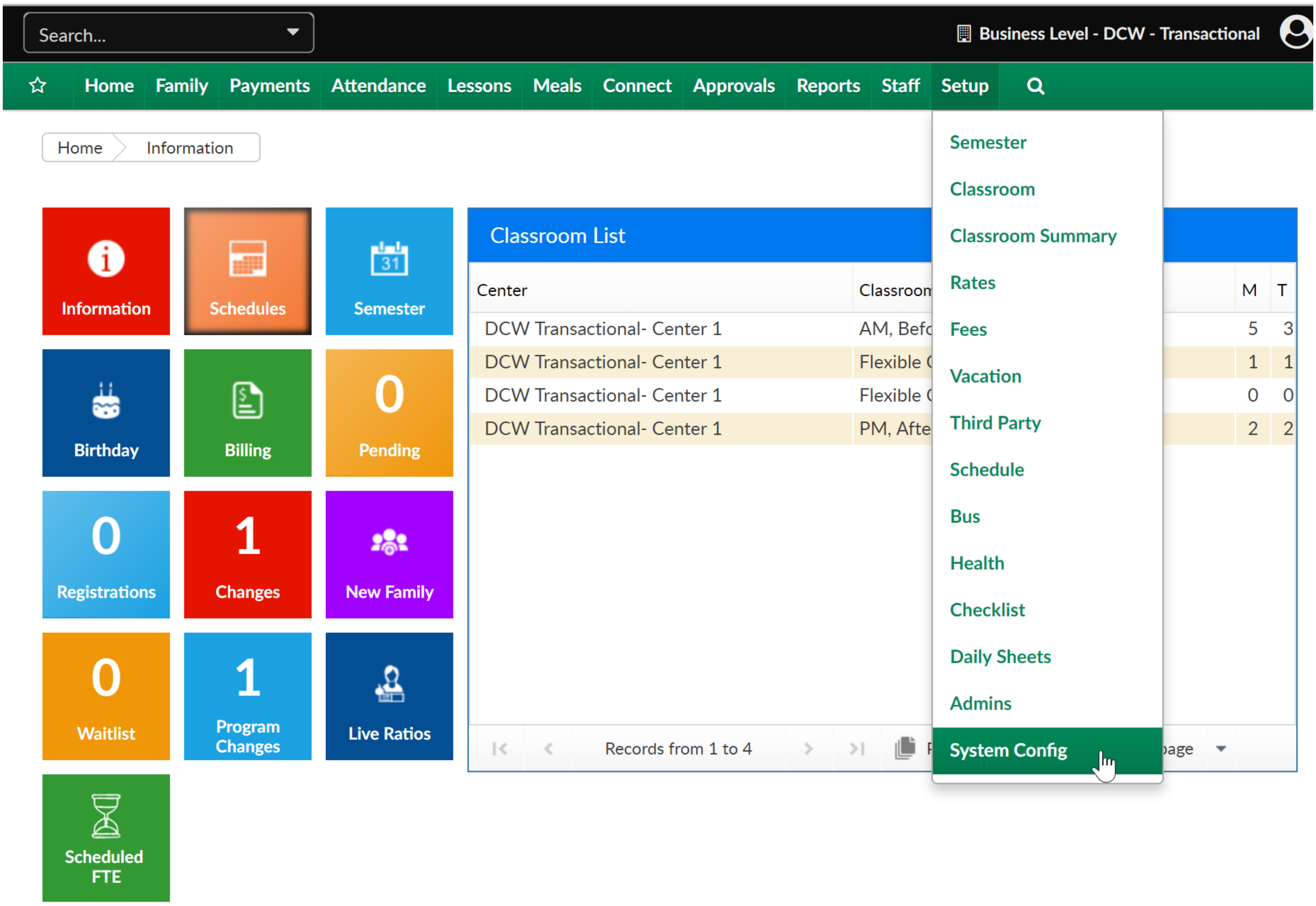
System Config > Storage

Last Modified on 05/21/2018 8:40 am EDT

The Setup > System Config > Storage screen allows for integrations with a third party storage site.

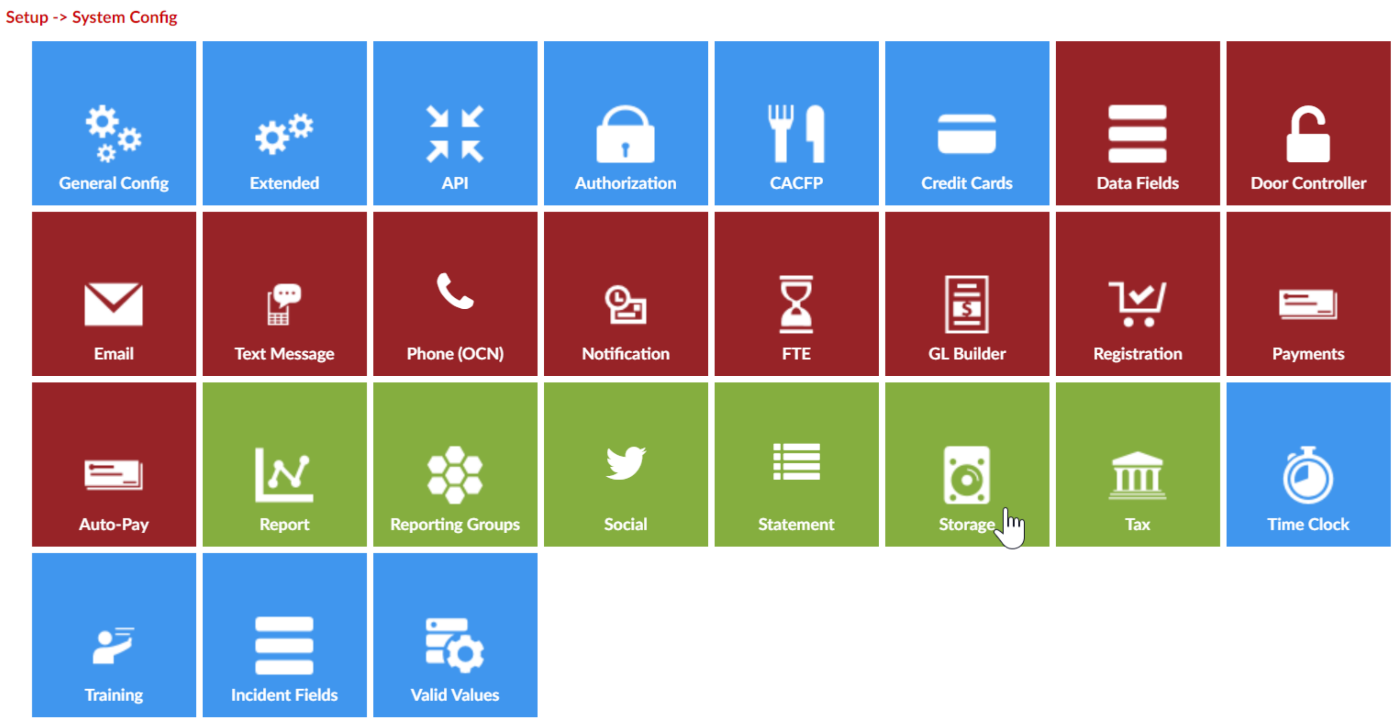
- Options:
  - No external system: locally
  - Microsoft Sky Drive
  - Amazon S3
  - Google Cloud Storage

From the Setup menu, select the System Config option.

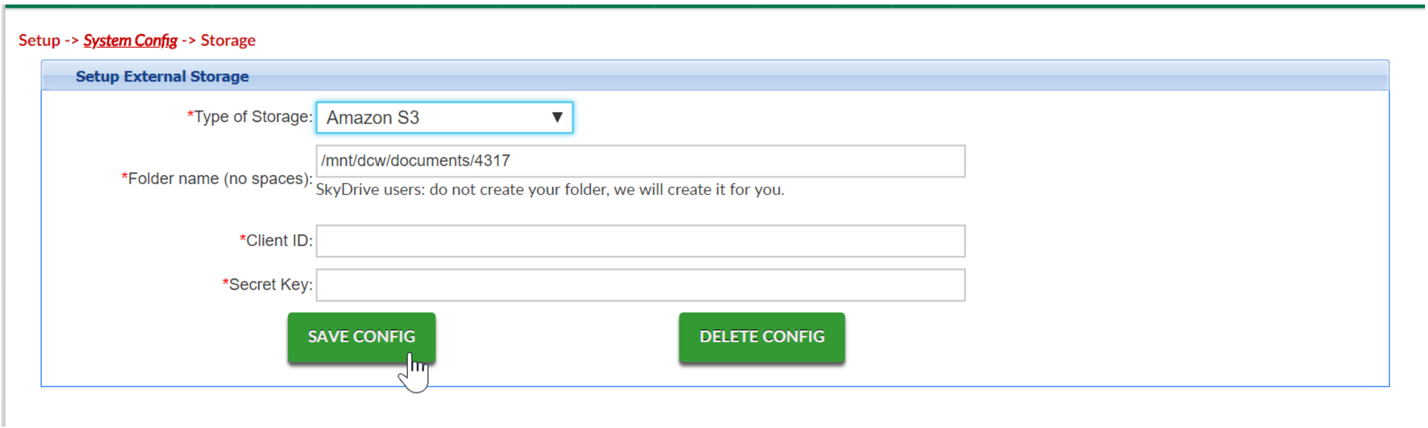


Center	Classroom	M	T
DCW Transactional- Center 1	AM, Befo	5	3
DCW Transactional- Center 1	Flexible (	1	1
DCW Transactional- Center 1	Flexible (	0	0
DCW Transactional- Center 1	PM, Afte	2	2

Then select the Storage tile



Select the type of service, enter details then press Save Config-


Setup -> System Config -> Storage

Setup External Storage

*Type of Storage: Amazon S3

*Folder name (no spaces): /mnt/dcw/documents/4317

SkyDrive users: do not create your folder, we will create it for you.

*Client ID:

*Secret Key:

Note: Additonal configuration may be needed, with the service provider your business selects

System Config > Tax

Last Modified on 12/21/2018 3:28 pm EST

Setting up taxes in the system allows centers the ability to charge families taxes on registration and tuition for classrooms and events. These taxes can be associated to specific centers, states, brands, divisions, or districts based on ordinances.

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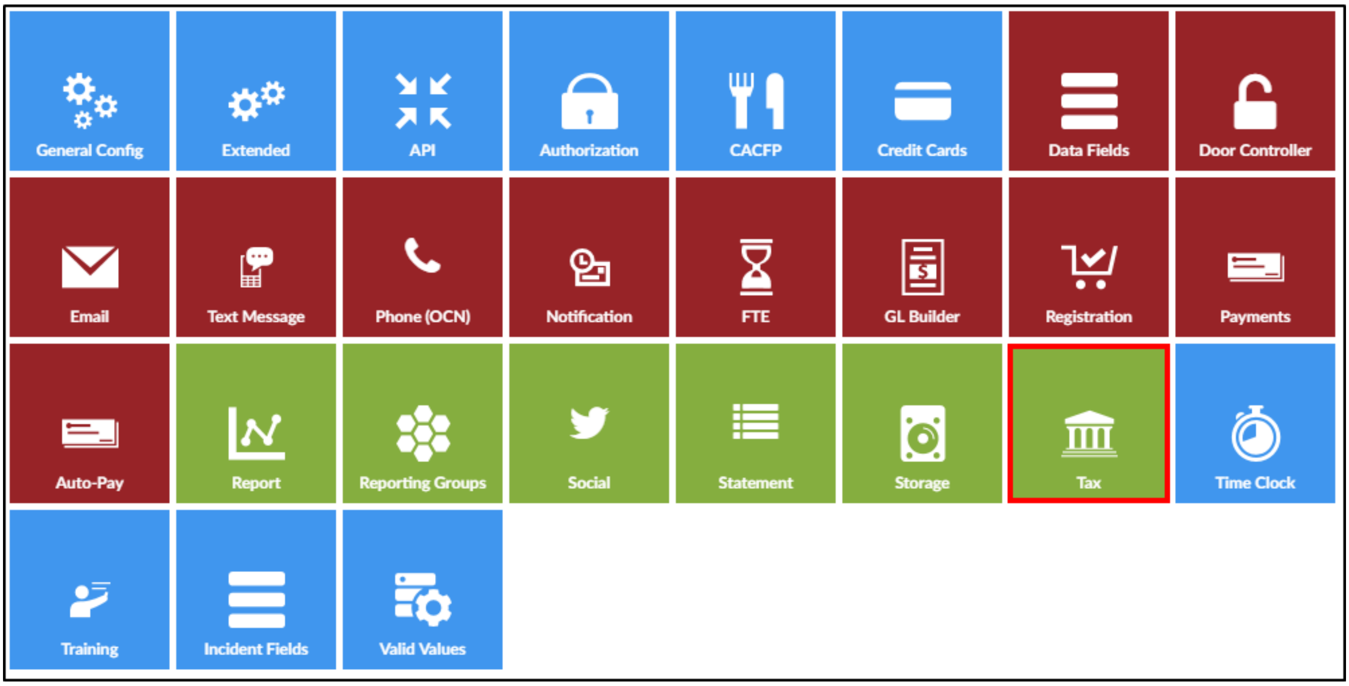
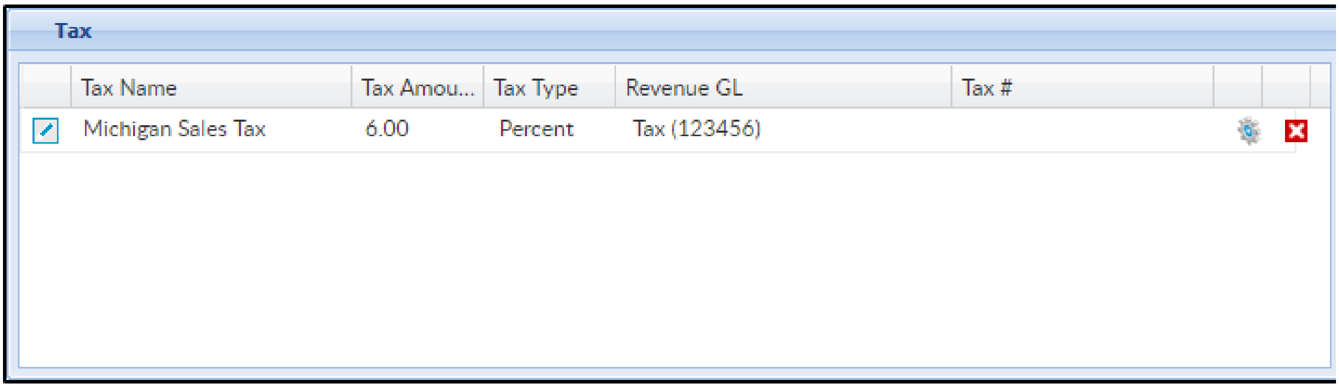
1. Click Setup from the menu, the select System Config
2. Click Tax



3. View current tax information on the top portion of the screen. Please Note: if there is more than one tax setup in the system, the system will automatically select the first one in the list

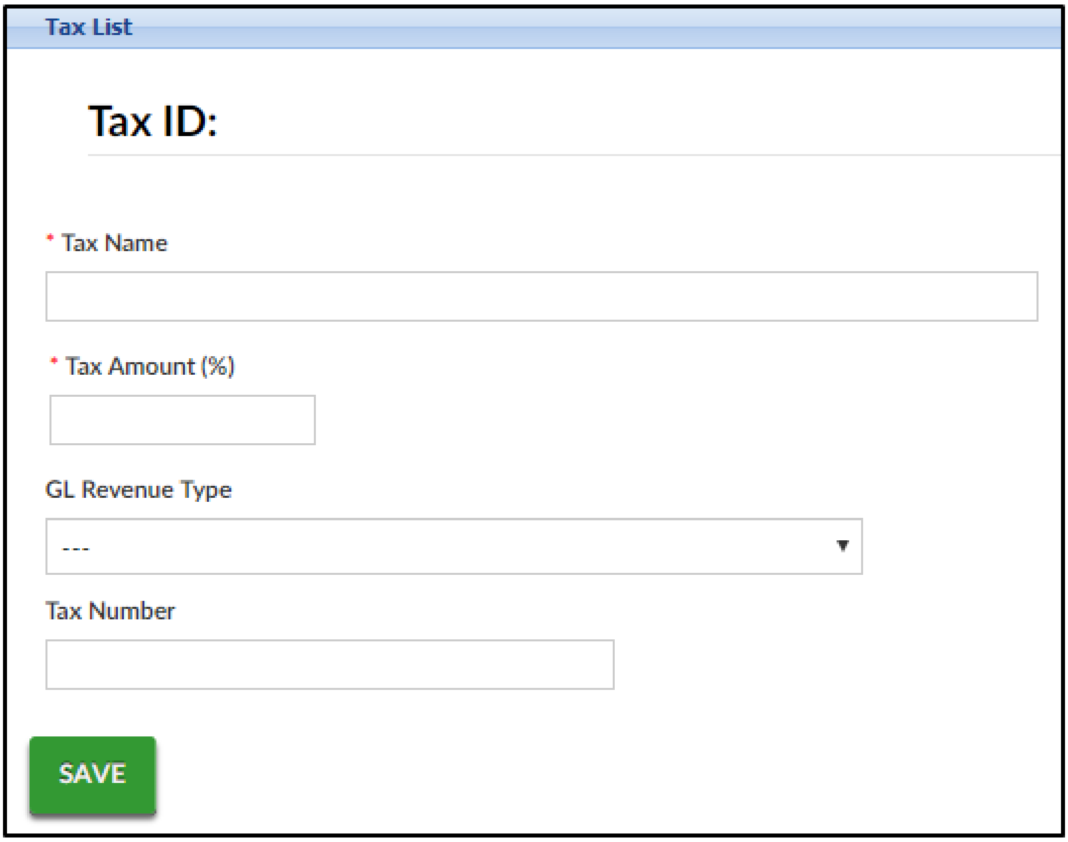


Tax

	Tax Name	Tax Amou...	Tax Type	Revenue GL	Tax #		
	Michigan Sales Tax	6.00	Percent	Tax (123456)			

- Click the edit icon on the left side of the row to edit the Tax List information
- Click the settings icon towards the right to Setup Tax Authorization
- Click the X to delete the tax information

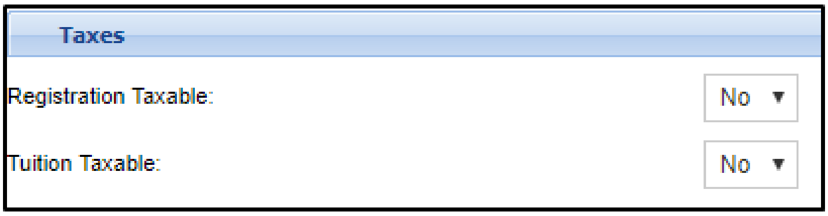
4. To add a new Tax Id, complete the lower section of the screen



   - Tax Name - enter the name of the tax
   - Tax Amount - enter the amount of tax as a percentage
   - GL Revenue Type - choose from the drop-down list
   - Tax Number - enter the tax ID number
5. Click Save

If registration or tuition for a program is eligible for taxes, follow the steps below.

1. Once taxes have been setup, navigate to Setup > Room
2. Click the name of the room you wish to add taxes to
3. Locate the Taxes section
   - Registration Taxable - select yes is the registration for the classroom is eligible for taxes
   - Tuition Taxable - select yes it the tuition for the classroom is eligible for taxes



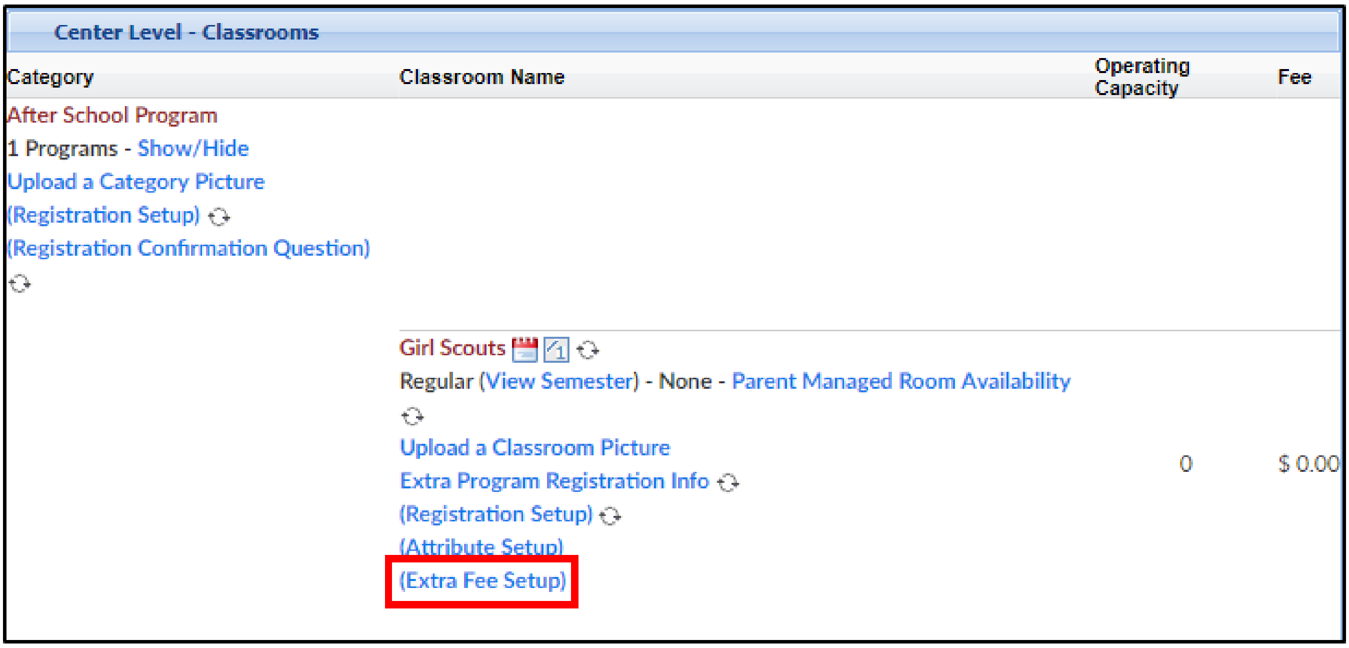
Registration Taxable: No

Tuition Taxable: No

Taxable Extra Room Fees

When setting up an extra room fee, there is an option to make it taxable.

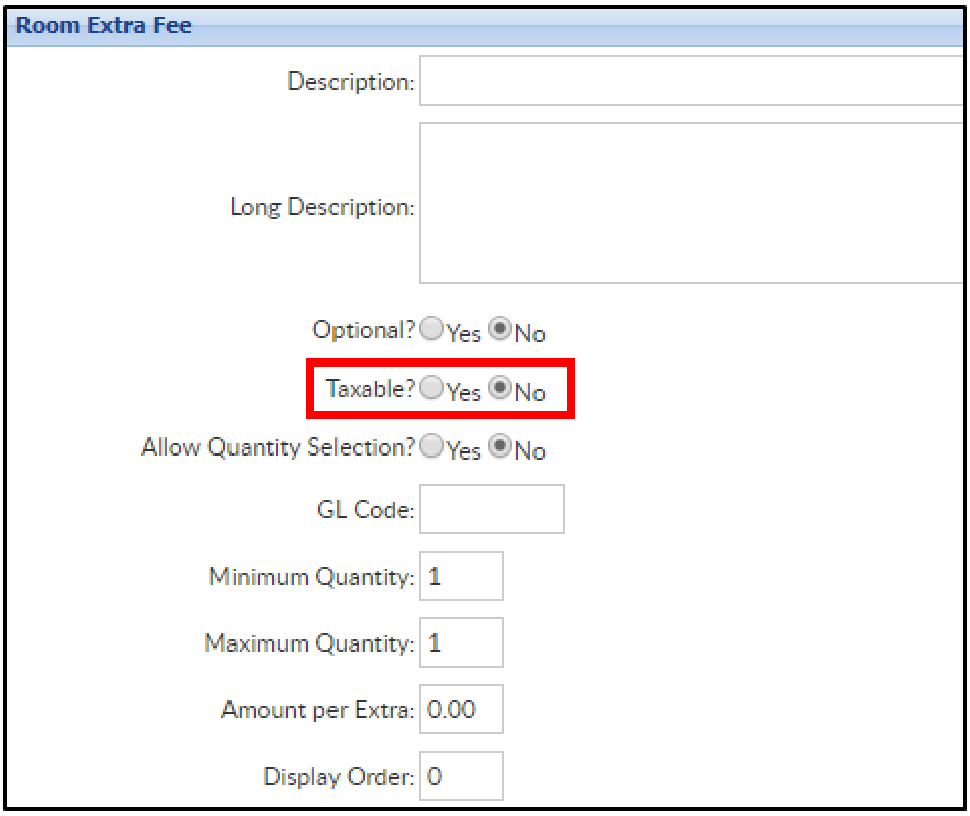
1. From the Setup > Classroom screen, click Extra Fee Setup



Center Level - Classrooms

Category	Classroom Name	Operating Capacity	Fee
After School Program 1 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	Girl Scouts Regular (View Semester) - None - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

2. When completing the Room Extra Fee section, select Yes under Taxable so allow this fee to be taxable



Room Extra Fee

Description:

Long Description:

Optional? ○ Yes ● No

Taxable? ○ Yes ● No

Allow Quantity Selection? ○ Yes ● No

GL Code:

Minimum Quantity: 1

Maximum Quantity: 1

Amount per Extra: 0.00

Display Order: 0

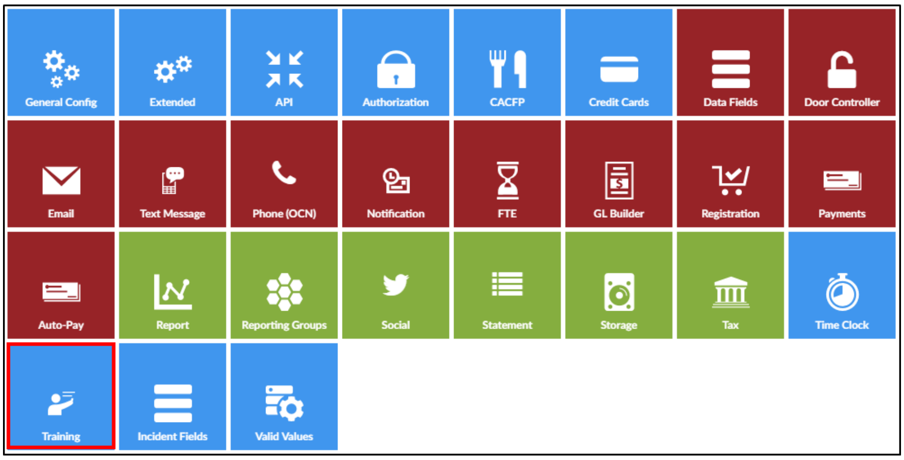
System Config > Training

Last Modified on 12/04/2018 9:57 am EST

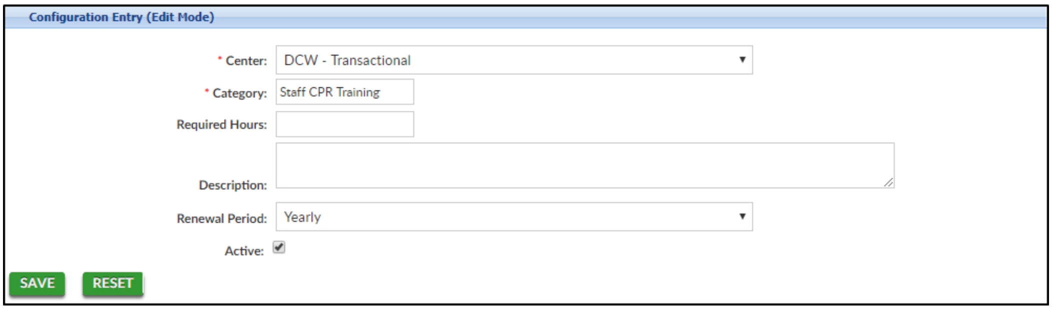
Training sessions can be setup and tracked within the system. See below to setup the training category and to record a training course.

Setup Training

1. Click Setup from the menu, then choose System Config. Select Training



2. Complete the Configuration Entry section



Configuration Entry (Edit Mode)

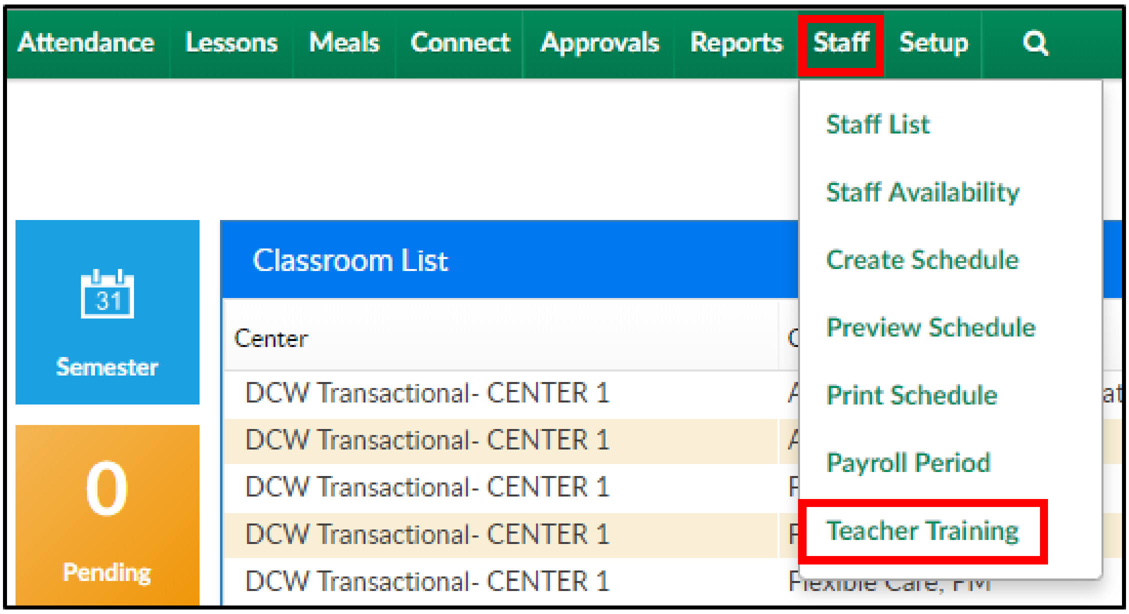
* Center: DCW - Transactional
* Category: Staff CPR Training
Required Hours:
Description:
Renewal Period: Yearly
Active: ☑

- Center* - select the location from the drop-down list or select the business level for all locations
- Category* - enter the name of the category
- Required Hours - enter the required number of hours, if applicable
- Description - enter a detailed description of the training
- Renewal Period
    - Daily/Weekly/Monthly/Yearly - how often the training needs to be renewed
    - No Renewal Period - the training does not require a renewal
- Active - place a check-mark to mark this training as active

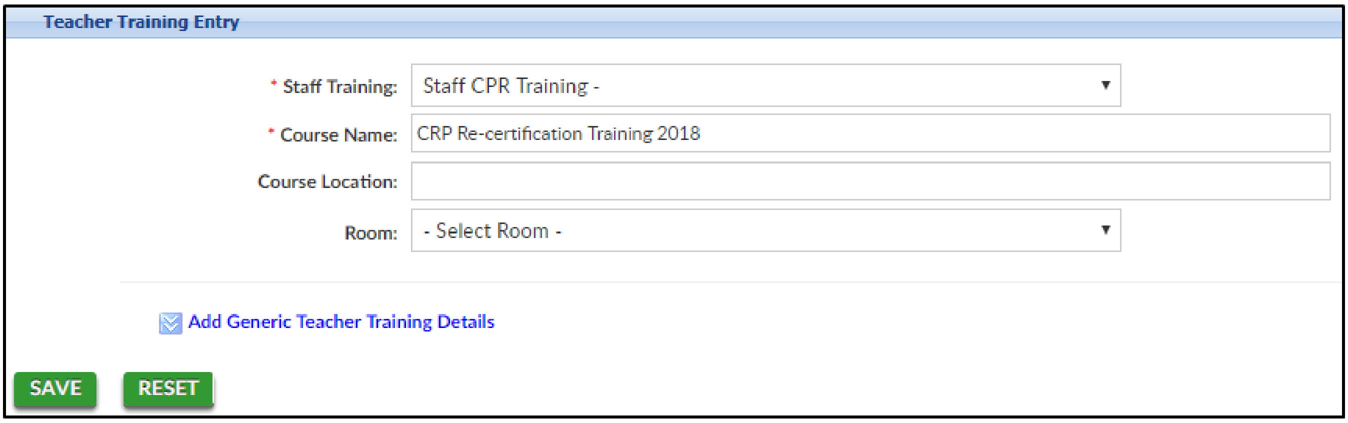
3. Click Save

Recording Staff Training

1. Click Staff from the menu bar, then select Teacher Training



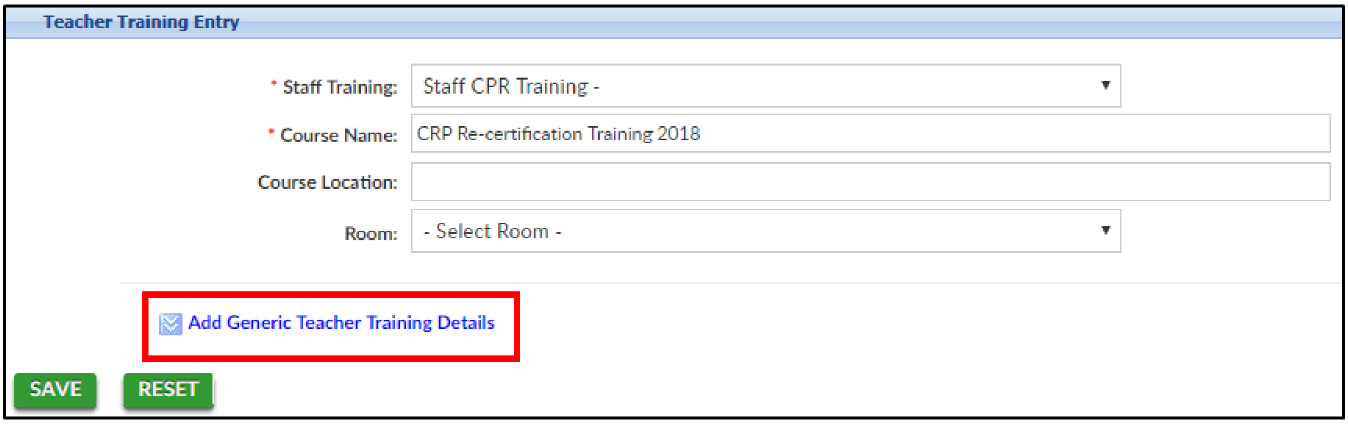
2. Complete the Teacher Training Entry section



* Staff Training: Staff CPR Training -
* Course Name: CRP Re-certification Training 2018
Course Location:
Room: - Select Room -

- Staff Training* - choose the correct training from the drop-down
- Course Name* - enter the name of the course
- Course Location - enter the location the course is taking place
- Room - select a room from the drop-down, if applicable

3. To add more details, click Add Generic Teacher Training Details



Teacher Training Entry

* Staff Training: Staff CPR Training -

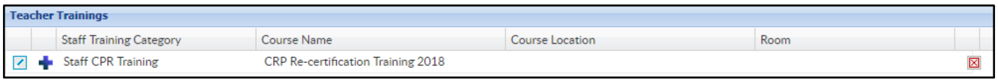
* Course Name: CRP Re-certification Training 2018

Course Location:

Room: - Select Room -

  - Teachers - choose the teachers to attend and add the additional details to
  - From/To Date - enter the beginning and end dates of the training
  - Number of Credits - enter the number of credits received after completion of this course, if applicable
  - Grade - enter the grade received for this course
  - Instructor Name - enter the name of the instructor teaching the course
  - Document Provided - if there was a document provided for the training material, place a checkmark in this field
  - Expiration Date - if this course expires, select the expiration date
  - Instructor Location - enter the location of the instructor
  - Reimbursement Cost - if there was an up front cost for teachers, but they will be reimbursed, enter the reimbursement cost here
  - Room Semester - select a room semester from the drop-down, if applicable
  - Notes - add any additional notes in regards to the training course

4. Click Save
5. Once the information is saved, this course will move to the Teacher Trainings sections above. The details can be edited by clicking the modify icon, teachers can be added by clicking the +, or the training can be deleted by clicking the X



Teacher Trainings

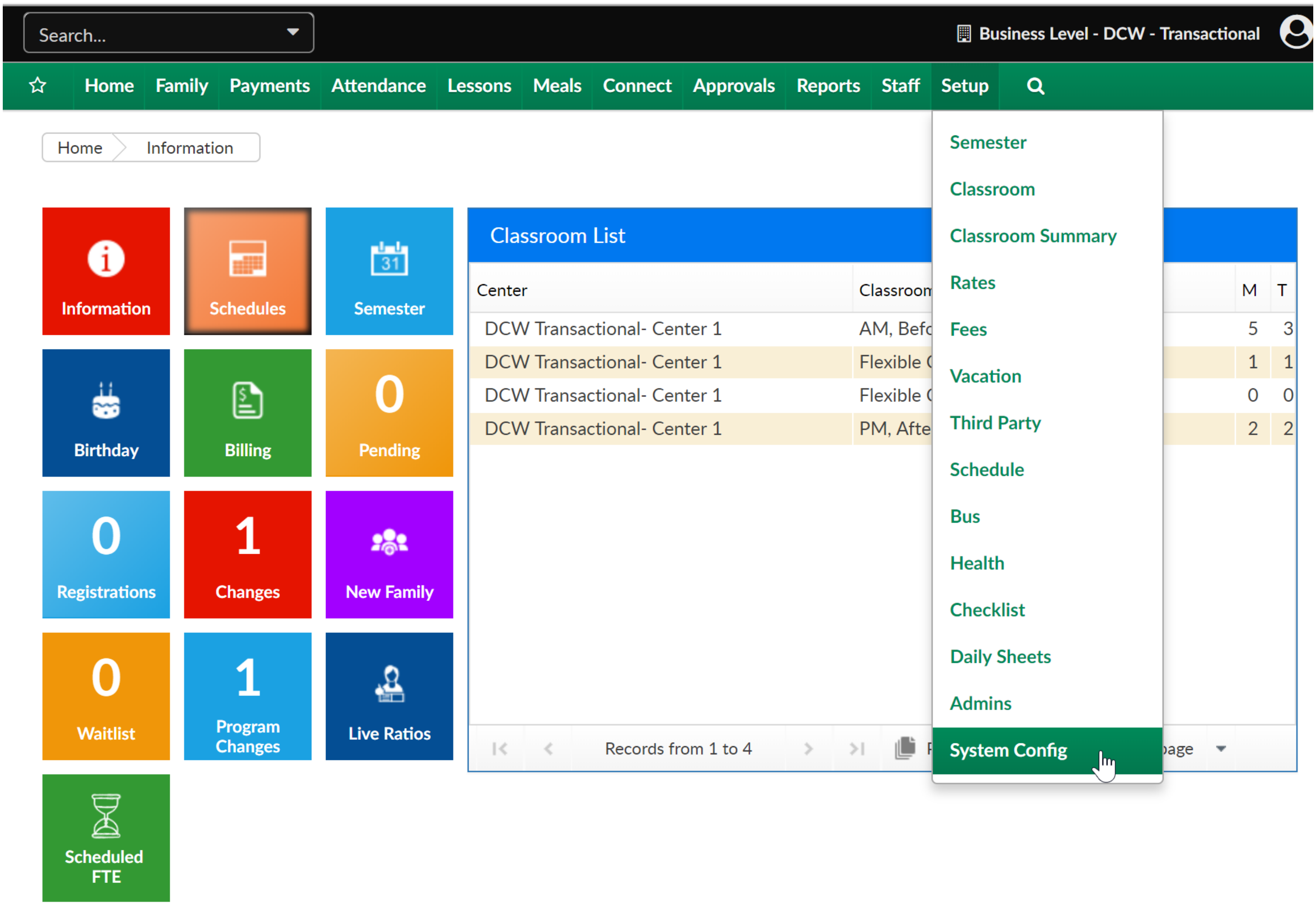
	Staff Training Category	Course Name	Course Location	Room	
✎ +	Staff CPR Training	CRP Re-certification Training 2018			☒

System Config > Incident Fields

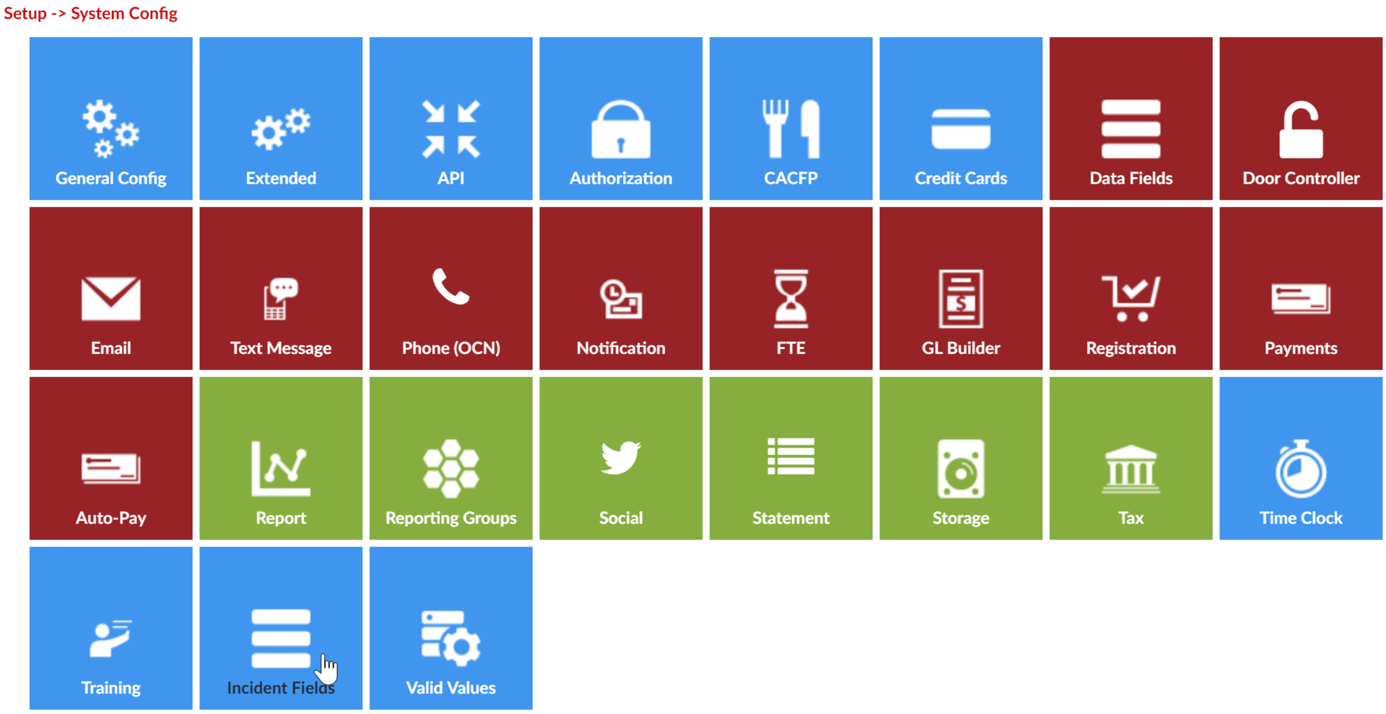
Last Modified on 05/22/2018 1:35 pm EDT

The Incident fields screen allows for customization of the incident form on the child screen of the family record .

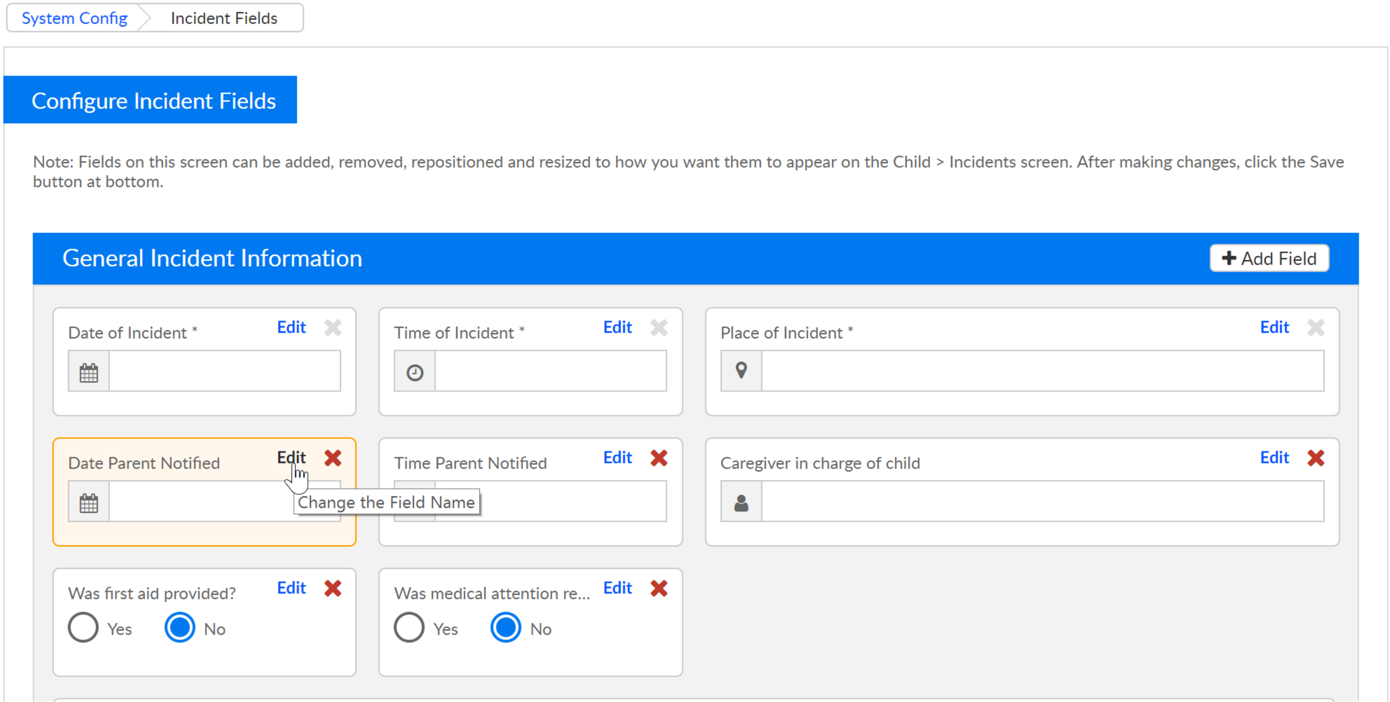
From the Setup menu, select the System Config option.



Then select the incident fields tile.



Most fields can be deleted or edited. To delete select the red x icon, to edit select the edit link.

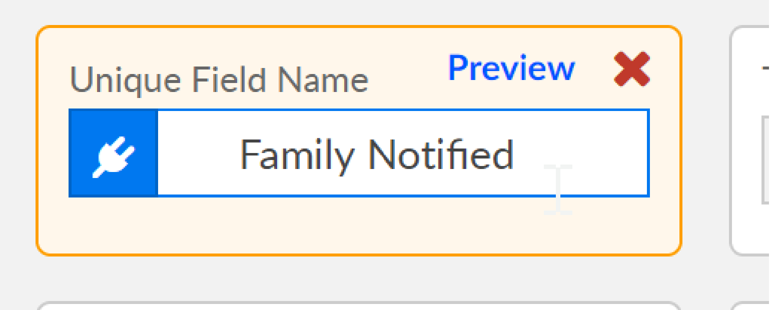


Note: Fields on this screen can be added, removed, repositioned and resized to how you want them to appear on the Child > Incidents screen. After making changes, click the Save button at bottom.

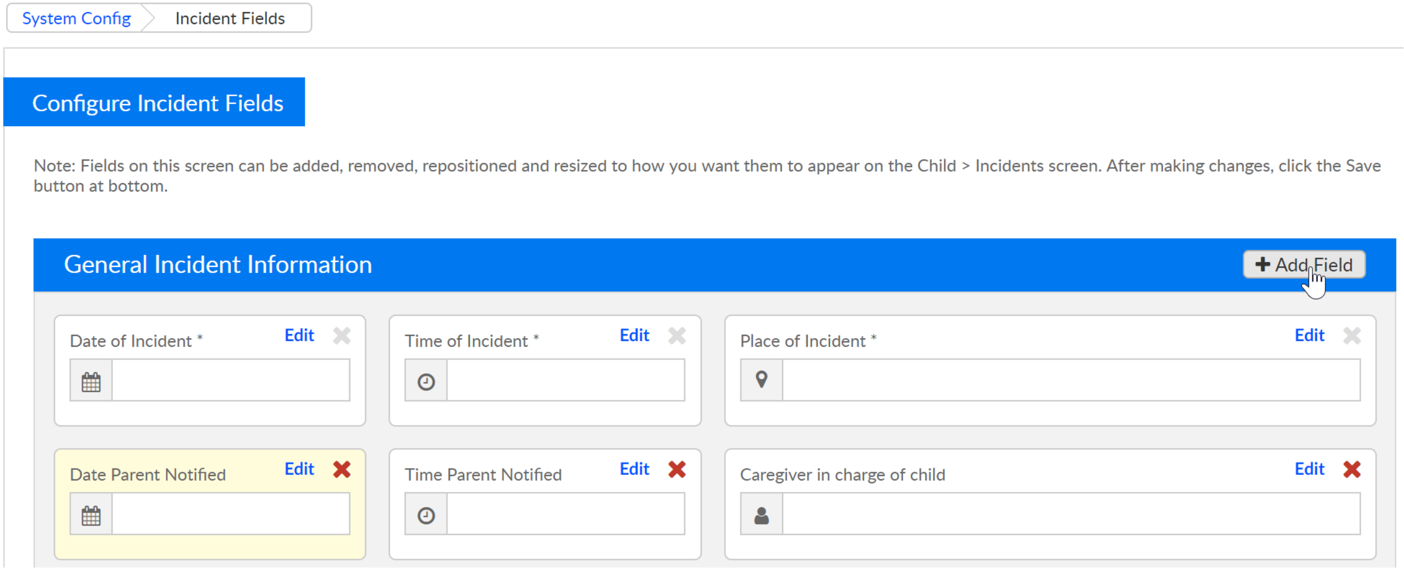
○ Yes ● No

○ Yes ● No

Enter the updated text then press preview-



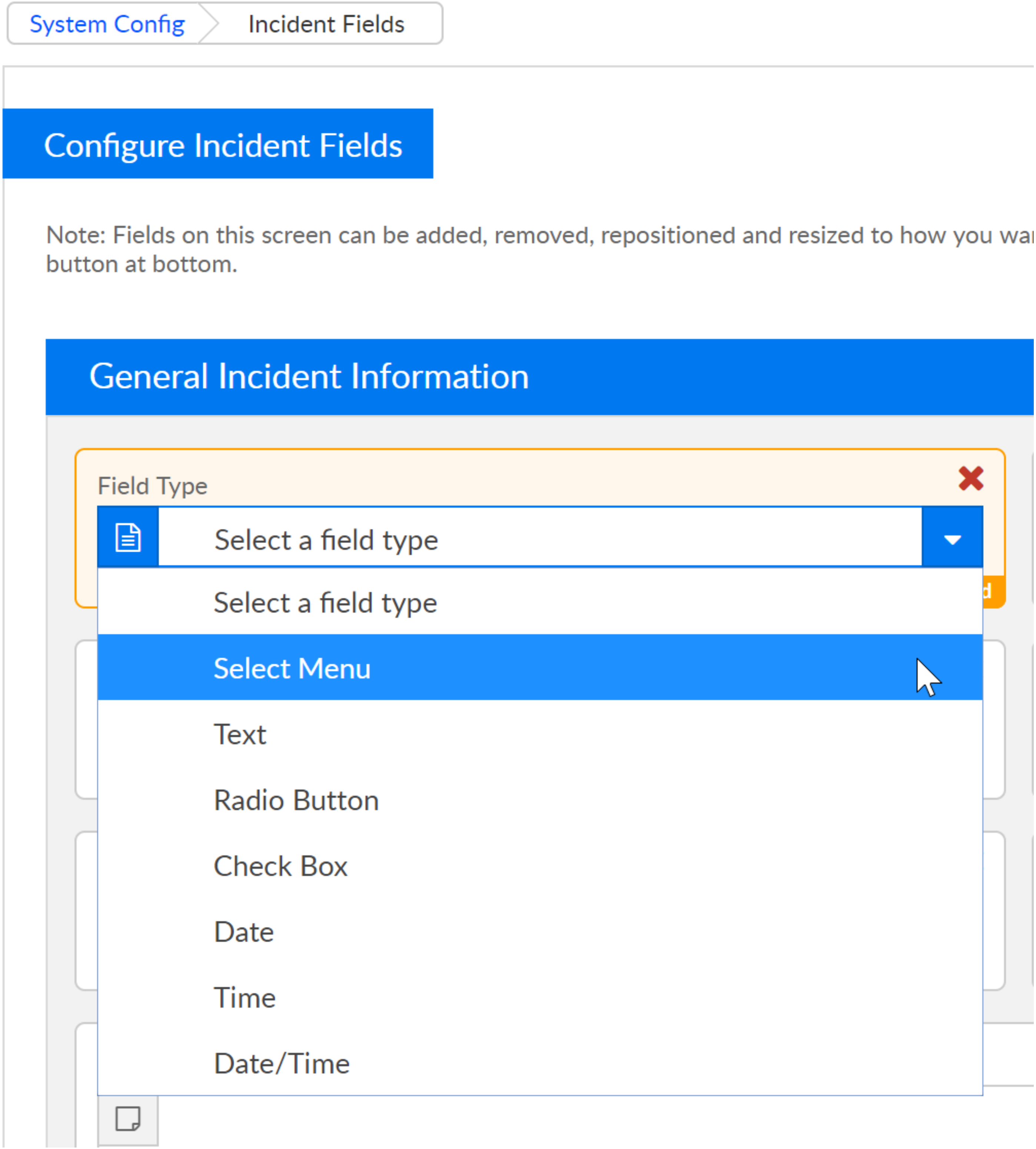
To add a field, select the Add field icon in the top right corner.



Note: Fields on this screen can be added, removed, repositioned and resized to how you want them to appear on the Child > Incidents screen. After making changes, click the Save button at bottom.

Select the field type and then enter text, when complete press the customize link.

- Select Menu
- Text
- Radio button
- Check Box
- Date
- Time
- Date/Time

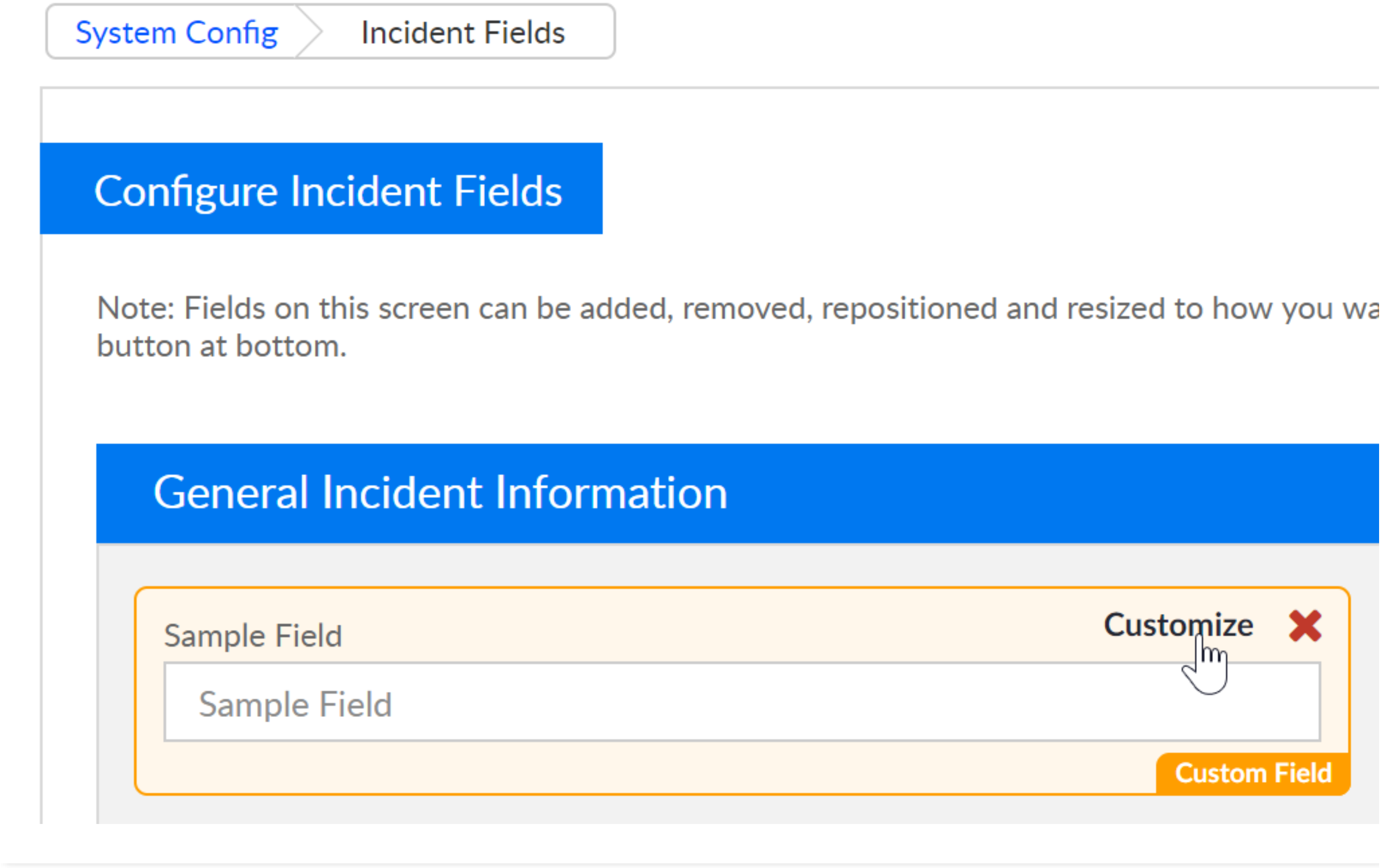


Configure Incident Fields

Note: Fields on this screen can be added, removed, repositioned and resized to how you wa
button at bottom.

General Incident Information

Example of a text type-



System Config > Incident Fields

Configure Incident Fields

Note: Fields on this screen can be added, removed, repositioned and resized to how you wa
button at bottom.

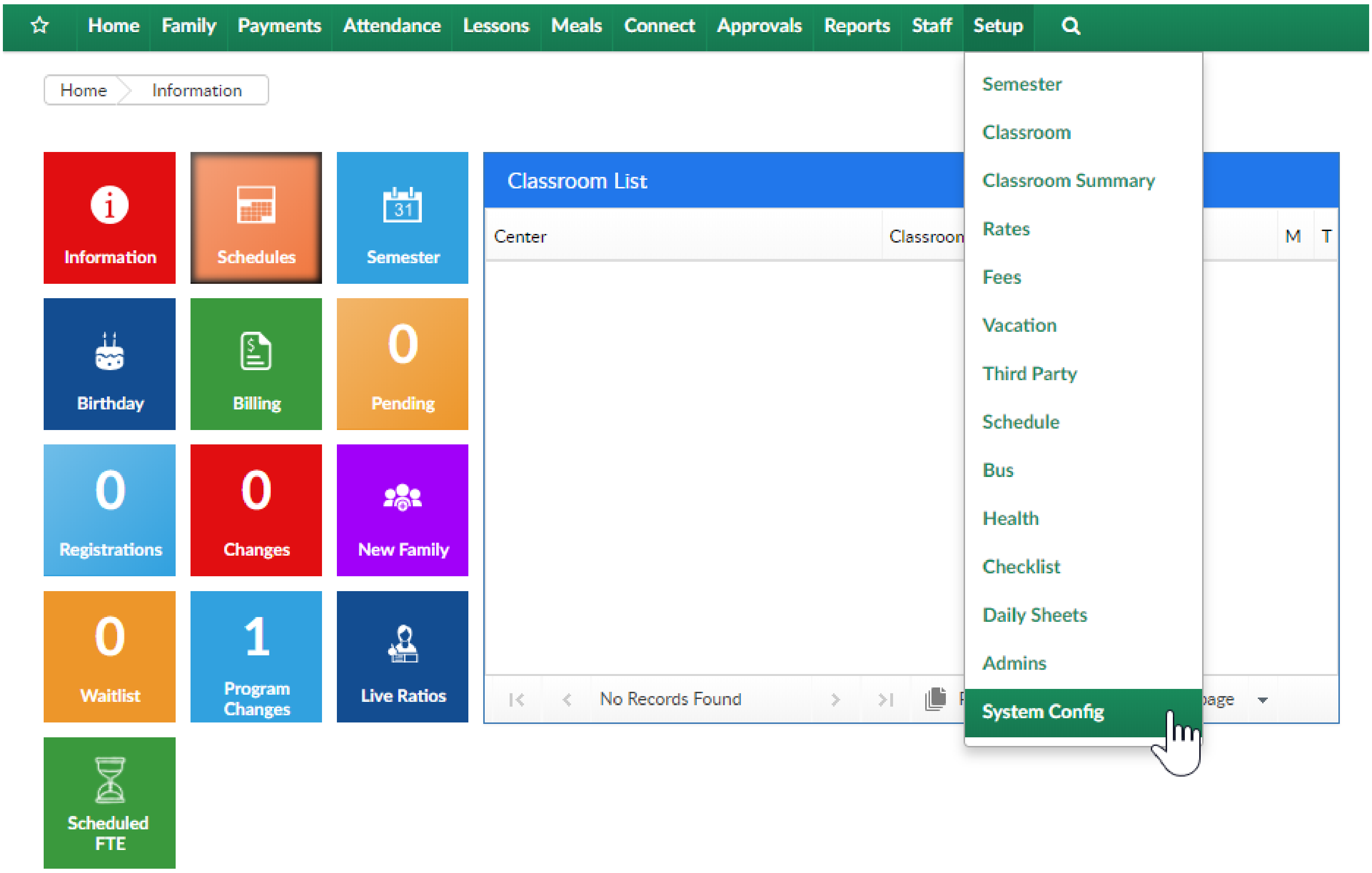
General Incident Information

System Config > Valid Values

Last Modified on 03/12/2018 7:50 am EDT

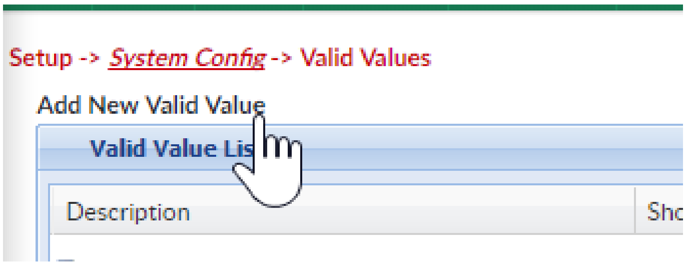
Valid Values allow you the ability to customize specific drop down lists in the system. These valid values may be associated to children, businesses, guardians or financial information.

To add or update valid values in the system go to Setup > System Config

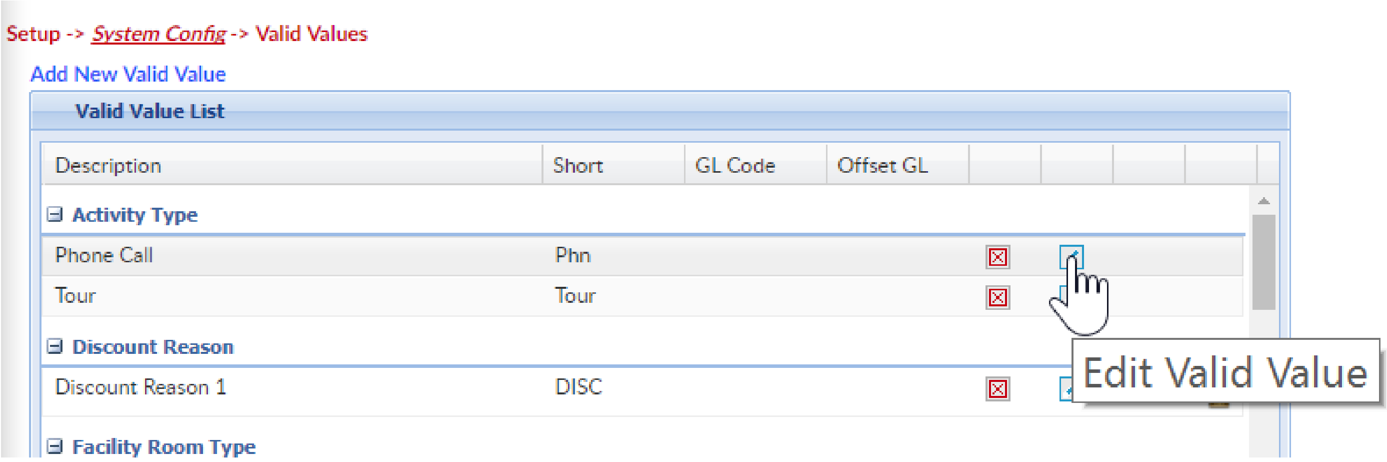


, Then select Valid Values

On the Valid Value screen any value that has already been added to the system will display in the valid value list. To add a new valid value select the Add New Valid Value option at the top of the screen.



To edit one of the already existing values, select the edit icon on the right hand side of each value's line-



Description	Short	GL Code	Offset GL		
⊟ **Activity Type**					
Phone Call	Phn			☒	✎
Tour	Tour			☒	
⊟ **Discount Reason**					
Discount Reason 1	DISC			☒	
⊟ **Facility Room Type**					

In the Valid Value box at the bottom of the screen fields will display based on which Value Type has been selected. The below fields will ALWAYS display regardless of the type of value that is being setup.

- Description- the name of the valid value, this will be what users see when they are making a selection from a valid value list.
- Short Name (Abbr)- this should be a shortened version of the description (4 characters)- this value must be unique throughout valid value types.
- Value Type- select the type of vaid value that is being setup.

The below fields will not display on every valid value, but are common-

- GL Code- this field will be used if the valid value type has been referenced when setting up General Ledger codes. This will typically be an account number that should pull into financial reports based on a company's chart of accounts.
- GL Center- if a particular site should be noted for a specific valid value.
- Display Order- this allows users to place a sequence number on each option within a value type- this will impact the order in which the options display in drop down menus to users.

Once information for a valid value has been added or updated press Save to commit changes.

Types of Valid Values- This is a list of all of the different types of valid values; it is recommended that valid values are setup prior to using the system.

- **Accounting ID**: For accounting purposes, used for external systems.
    - **What this impacts**: The **Accounting ID** valid value is used to assign to a child to an accounting identification number for use in external systems.
- **Activity Type**: A list of activities used to marketing the daycare facility.
    - **What this impacts**: The **Activity Type** valid value is used to create activities for the marketing campaigns in the system.
- **Adjustment Type**: A method of adjusting a family's financial ledger.

    - **What this impacts**: The **Adjustment Type** valid value is used to make adjustments to transactions in the system.
- **Age Group**: For reporting purposes, using the **Age Range** section.
    - **What this impacts**: The **Age Group** valid value is used to assign rate categories for a facility based on an age range. This will appear on the **Age Range Report**.
- **Bank**: A list of banks that deposits are made to from the facility.
    - **What this impacts**: The **Bank** valid value is used to list banks that deposits are made to from a facility.
- **Brand**: A type of facility within the business.
    - **What this impacts**: The **Brand** valid value is used to label facilities in a business. This can be used to identify multiple brands or different facilities within a business.
- **Campaign Type**: A campaign type for the facility, used for marketing purposes.
    - **What this impacts**: The **Campaign Type** valid value is used to label campaigns used to recruit children and families to a facility.
- **Contact Type**: The **Contact Type** valid value is used to group contacts for a child.
    - **What this impacts**: The **Contact Type** valid value is used to group similar contacts for children in the system.
- **County**: For addresses, locations and rates for children.
    - **What this impacts**: The **County** valid value is used to assign a county to locations and rates for children.
- **Discount Code**: For discounts for employees, used if Discounts aren't setup for the facility.
    - **What this impacts**: The **Discount Code** valid value is assigned to families in

    the **Family** section.

- **District Office**: For identifying the home office for the family.
    - **What this impacts**: The **District Office** valid value is the home office assigned to the facility and child.
- **Division**: A group of facilities or centers.
    - **What this impacts**: The **Division** valid value is used to group a similar section of facilities or centers in one brand.
- **Document Type - Student**: A document uploaded into the system for students.
    - **What this impacts**: The **Document Type - Student** valid value is used to associate documents uploaded into the system as student documents.
- **Document Type - Center**: A document uploaded into the system for centers or businesses.
    - **What this impacts**: The **Document Type - Center** valid value is used to associate documents uploaded into the system as center or center documents.
- **Employee Position**: For identifying the employee's position within the company.
    - **What this impacts**: The **Employee Position** valid value is used to identify the guardian's position within the company.
- **Exempt Immunization Type**: A reason a child will not be receiving an immunization. Typical examples may including religion or health.
    - **What this impacts**: The **Exempt Immunization Type** valid value is used when setting up immunization records for children.
- **Facility Type**: A type of facility for rent within the business.
    - **What this impacts**: The **Facility Type** valid value is used to describe locations that can be rented out to outside parties. This can also be used as a bigger

category of rooms.

- **Facility Room Type**: A type of room in a facility for rental.
    - **What this impacts**: The **Facility Room Type** valid value is used to describe a room or location in a facility that can be rented out to outside parties.
- **Family Tracking Status**: A status that can be assigned to families for registration tracking.
    - **What this impacts**: The **Family Tracking Status** valid value is used to associate families for tracking on the **Program Wait List** and **Registration** tabs in the **Approvals** tab on the main toolbar.
- **Followup Type**: A follow up method for waiting list or pending children.
    - **What this impacts**: The **Followup Type** valid value is a method of following up to children and families on the waiting list for the facility.
- **Funding Type**: The name of the sponsor program.
    - **What this impacts**: The **Funding Type** valid value is used to identify the funding sponsor for the child.
- **Home School**: For identifying the child's home center.
    - **What this impacts**: The **Home School** valid value is used to identify the home center for the child.
- **Inventory Attribute**: A attribute or characteristic of an item in the inventory system.
    - **What this impacts**: The **Inventory Attribute** valid value is used to associate characteristics to an item in the inventory system in the system.
- **Job Category**: The primary job category for the employee in the facility.
    - **What this impacts**: The **Job Category** valid value is used to describe the category for the employee's job in the availability schedule.

- **Job Task**: A job task for an employees schedule in the facility.
    - **What this impacts**: The **Job Task** valid value is used to assign task to a staff member's schedule.
- **Lead Calendar Status**: The current status of the calendar event on the lead management calendar.
    - **What this impacts**: The **Lead Calendar Status** valid value is used to assign status messages to events on the lead management calendar.
- **Lead Source**: The source that led the child to enrolling into the facility.
    - **What this impacts**: The **Lead Source** valid value used to determine the how the child was recruited to enrolling into the facility.
- **Payroll Code**: This code is not currently used in the system but will be used in the future.
    - **What this impacts**: This valid value is not currently used in the system.
- **Relationship**: The relationship between an adult and a child in the facility.
    - **What this impacts**: The **Relationship** valid value is a code assigned to parents or contacts for a child in the facility.
- **Revenue Type**: A revenue source that is brought into a businesses. Typical examples may include tuition, registration or activity fees.
    - **What this impacts**: A revenue type is used to associate money from a classroom or program as well as money from type-fee Valid Values.
- **Room Attribute**: A room attribute is a tag, associated to classrooms, that parents can use when searching for a classroom online.
    - **What this impacts**: Classroom attributes are assigned categories or topics for classrooms in the center. These attributes can be used by parents when searching for a particular classroom through the portal. Topics could include outdoor sports, team sports or science activities.

- **Schedule**: An assigned schedule or period for children, used for reporting.
    - **What this impacts**: The **Schedule** valid value is an code used to determining the schedule for the child in the facility, such as Full Time or Part Time. This is only used for reporting.
- **Schedule Availability**: Codes for scheduling staff members in the facility, such as available, vacation, center, etc.
    - **What this impacts**: The **Schedule Availability** valid value is a code used for creating schedules for staff members in the facility including time when the staff member is available to work, on vacation, or in other schedule categories.
- **Serving Size Unit**: The serving size for children in a meal program.
    - **What this impacts**: The **Serving Size Unit** valid value is the portion size served to children for meals in the facility.
- **Staff Certification Type**: A type of certification that can be recorded and tracked for employees in the center.
    - **What this impacts**: The **Staff Certification Type** allows a certification to be assigned to a staff member.
- **Staff Group**: A staff group **Valid Value** is used to associate a staff member to a specific group.
    - **What this impacts: Staff Group** valid value help manage groups of employees in the system.
- **Staff Type**: Types of staff in a facility, such as Full Time or Part Time.
    - **What this impacts**: The **Staff Type** valid value labels a staff member as a Full Time, Part Time employee in the facility.
- **Staff Hour Type**: The hourly pay type for an employee, such as hourly or salary.
    - **What this impacts**: The **Staff Hour Type** valid value labels a staff member as

an hourly or salary employee in the facility.

- **Staff Certification Type**: A type of certification that can be recorded and tracked for employees in the center.
    - **What this impacts**: A **Staff Certification Type** valid value is used to associate certifications to employees
- **Student Attendance Code**: Attendance codes for children's attendance, to indicate events in the facility.
    - **What this impacts**: The **Student Attendance Code** valid value is a code for a child or staff member's attendance in a room or program.
- **Success Level**: This code is not currently used in the system but will be used in the future.
    - **What this impacts**: This valid value is not currently used in the system.
- **Termination Code**: To identify reason for child being withdrawn from a facility.
    - **What this impacts**: The **Termination Code** valid value is a code assigned to students that are withdrawn for a facility.
- **Type - Payment**: A method of payment into the system.
    - **What this impacts**: The **Type - Payment** valid value is a payment that can be made to a billing statement.
- **Type - Fee**: A category for fees that can be assigned to an account.
    - **What this impacts**: The **Type - Fee** valid value is a fee that can be assigned to a billing statement.

Hard Coded Valid Values- The system has several hard coded valid values that correlate to activities within the system. These valid values must be setup prior to using the function. *The 3 to 4 letter code must be entered in the* ***Short Name (Abbr)*** *text box for the valid value.*

Revenue Type Valid Values

- Registration - *REG*
    - This is used to associate registration revenue on a family's financial ledger. This is required to associate discounts or coupons to **Type - Fees**.
- Tuition - *TUIT*
    - This is used to associate tuition revenue on a family's financial ledger. This is required to associate discounts or coupons to **Type - Fees**.

Type - Fee Valid Values

- Balance Forward - *BalF*
    - This is used when importing outstanding balances into the system.
- Normal Fee - *NFEE*
    - This a used for system generated line items on a billing statement that aren't associated to **Type - Fees**.
- Reservation Fee - *RESV*
    - This is used when applying an automatic reservation fee to a family.
- Late Fee - *LFEE*
    - This is used when applying automatic late payment fees to a family's financial ledger.
- Payment Write Off - *FWO*
    - This is used when writing off payments not paid by families in the system.
- Registration - *REG*
    - This is used for registration into a classroom.

- Re-Registration - *RERE*
    - This is used when using a batch process to enter re-registration fees for families.
- Third Party Recovery Fee - *TPBR*
    - This is used when recovering previously written off fees from a third party agency.
- Third Party Write-off Fee - *TPWO*
    - This is used when writing off fees from a third party agency.

Type - Payment Valid Values

- Check - *CHEQ*
    - This is used when entering a check payment from a family.
- Money Order - *MORD*
    - This is used when entering a money order payment from a family.
- Cash - *CASH*
    - This is used when entering a cash payment from a family.
- ACH - *PACH*
    - This is used when entering an ACH payment from a family.
- Payroll Deduction - *PDCT*
    - This is used when entering a payroll deduction payment from a family.
- Payment Recovery - *PYRC*
    - This is used when recovering a written off payment from a family.

- Payment Correction - *PYCO*
  - This is used when correcting a previously posted payment for a family.
- Payment Return - PYRT
  - This is used when recording a payment as being returned.
- Payment Refund - *REFD*
  - This is used when refunding a family for a credit on their financial ledger.
- Credit Card - *CCRD*
  - This is used to associated online credit cards into the system.
- Scholarship - *SCHL*
  - This is used to associate scholarships in the system.

Student Attendance Code Valid Values

- Unscheduled Attendance - *U*
  - This is used when recording unscheduled attendance for children in the system.
- Missing Child - *MSCH*
  - This is used when recording a child as being missing from a scheduled day in the system. This valid value will send the missing child email to the parents.
- Normal - *NORM*
  - This is used when recording normal attendance for a child in the system.
- Absent - *A*

    - This is used when recording an absent day for a child in the system.

System Config > Child Docs

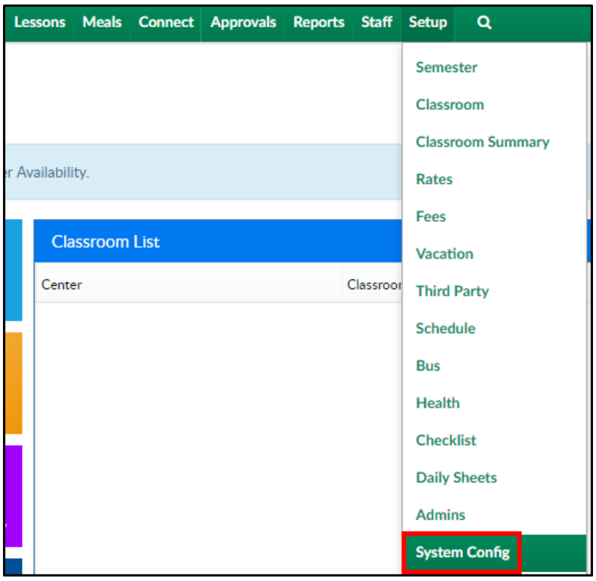
Last Modified on 12/21/2018 12:41 pm EST

The Documents/Checklist screen from the Children tab allows users to upload student-specific documents into the system. Administrators can create a list of required documents for students meeting certain criteria, such as the center they attend, age or grade of the student, etc.

For instructions on how to upload document into the student's record, click here .

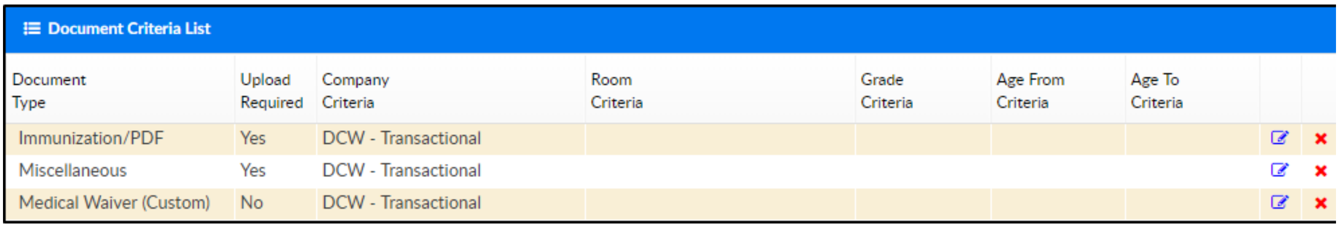
To add student criteria to the document type, follow the steps below:

1. Click Setup from the menu, then select System Config



2. Click the Child Docs tile

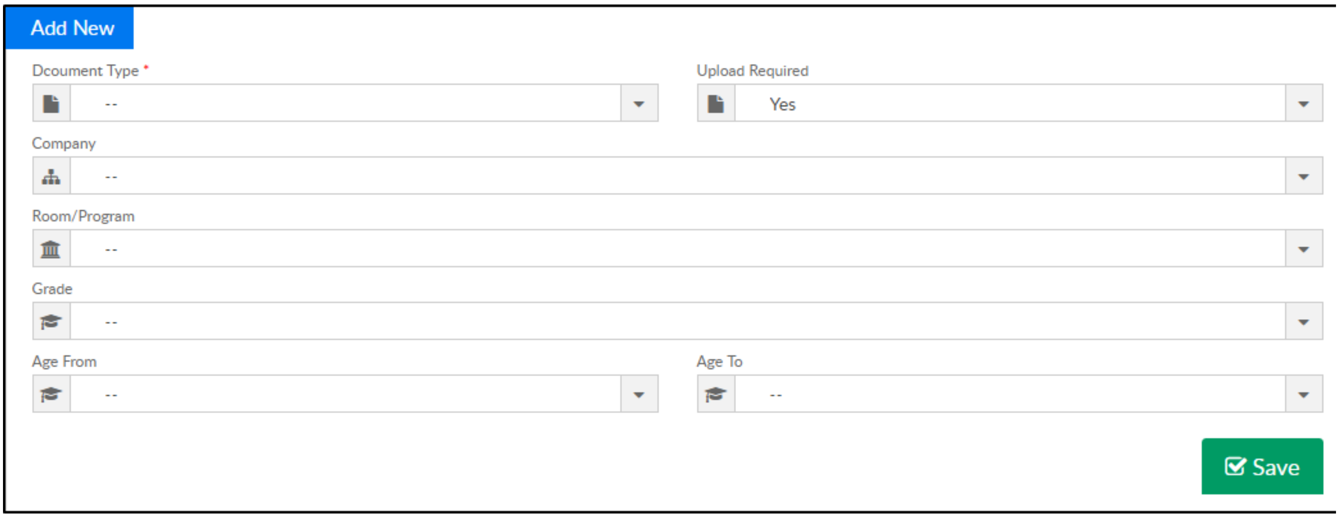
3. The Document Criteria List will show a list of all documents added to the system



Document Criteria List

Document Type	Upload Required	Company Criteria	Room Criteria	Grade Criteria	Age From Criteria	Age To Criteria		
Immunization/PDF	Yes	DCW - Transactional					✎	✕
Miscellaneous	Yes	DCW - Transactional					✎	✕
Medical Waiver (Custom)	No	DCW - Transactional					✎	✕

4. Complete the Add New section below the Document Criteria List



Dcoument Type * --

Upload Required Yes

Company --

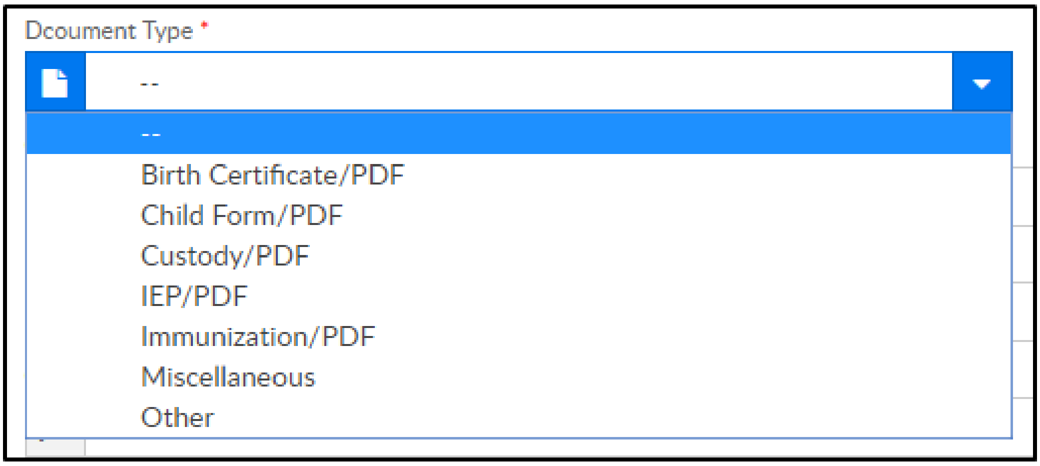
Room/Program --

Grade --

Age From --

Age To --

5. Document Type (required) - choose from the drop-down (if more Document Types need to be added, see Add New Document Type – Valid Values section below)

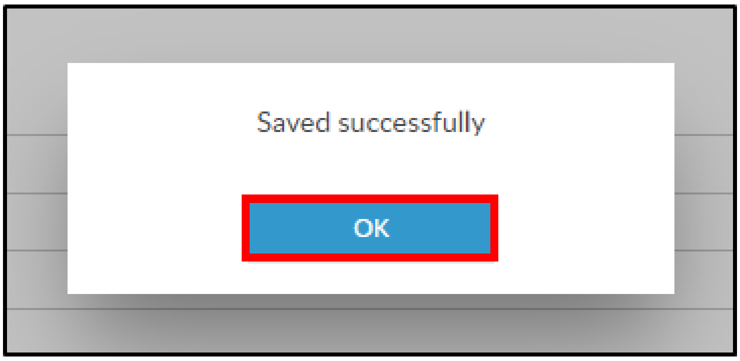


Dcoument Type * --

- --
- Birth Certificate/PDF
- Child Form/PDF
- Custody/PDF
- IEP/PDF
- Immunization/PDF
- Miscellaneous
- Other

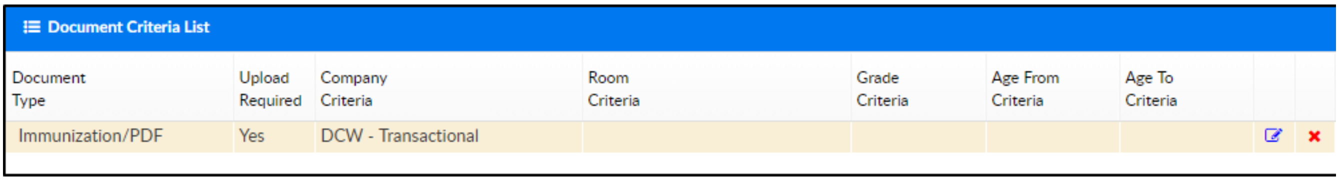
6. Upload Required
    - Yes – uploading a document will be required
    - No – an upload is not required, but a document can still be uploaded
7. Company (required) – select the center or business level from the drop-down. **Please Note**: If multiple, but not all centers need this document, a new document must be added for each center
    - Business Level – if the document is necessary for all centers, select the business level
    - Center – if the document is specific to a center, select the center from the drop-down
8. Room/Program – select a room/program, if applicable. If a room/program is selected, this document will only appear for students within that room/program
9. Grade – select a grade, if applicable. If a grade is selected, this document will appear for all students in the selected grade

10. Age From/Age To – select a from and to age, if applicable. If there is an age selected, this document will appear for all students within that age range
11. Click Save
12. The following popup will appear, click OK



Saved successfully

13. The new document will appear in the Document Criteria List above



Document Criteria List

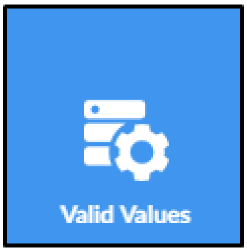
Document Type	Upload Required	Company Criteria	Room Criteria	Grade Criteria	Age From Criteria	Age To Criteria		
Immunization/PDF	Yes	DCW - Transactional					✎	✖

- Click the ✎ icon to edit the document information
- Click the ✖ to delete the document

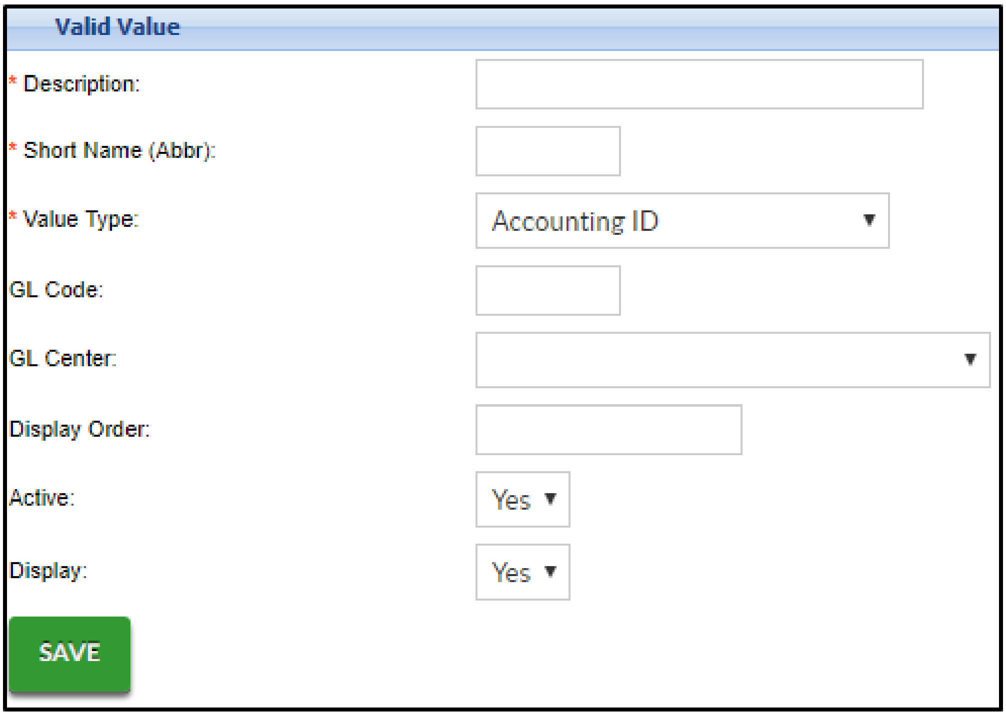
Adding a New Document Type - Valid Values

There are 7 Document Types all centers will have preloaded into the system. If more Document Types need to be created, follow the steps below:

1. Click Setup from the menu, then select System Config
2. Select the Valid Values tile



3. Scroll to the Valid Value section


Valid Value

* Description:

* Short Name (Abbr):

* Value Type: Accounting ID

GL Code:

GL Center:

Display Order:

Active: Yes

Display: Yes

4. Description – enter the name of the Document Type


* Description: Medical Waiver

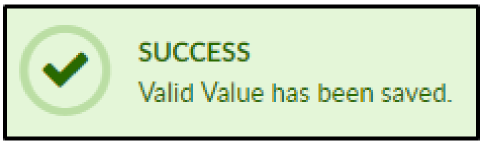
5. Short Name (abbv.) – enter an abbreviation of the name


* Short Name (Abbr): MEDW

6. Value Type – select Document Type - Student from the drop-down menu


* Value Type: Document Type - Student

7. GL Code - enter the general ledger code, if applicable
8. Display Order – enter the number to display, if the document should be the first in the list, enter 1
9. Document Type – choose the document format from the drop-down (PDF, Word, etc.)
10. Active
    - Yes – the document should be active
    - No – the document should not be active
11. Display
    - Yes - display the document type for selection
    - No - do not show this document type as an option
12. Click Save
13. A confirmation message will appear at the top of the page. The added type can now be selected from the Document Type drop-down menu



SUCCESS

Valid Value has been saved.

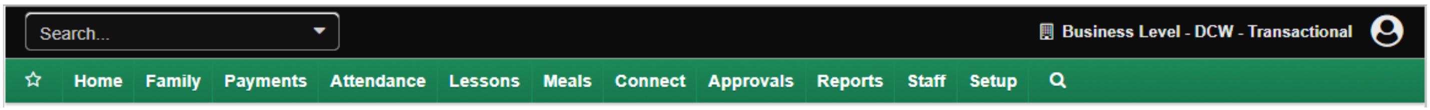
Basic Navigation/Searching Tips

Last Modified on 03/14/2018 9:42 am EDT

Searching within DayCare Works/SchoolCare Works is easy, there are a couple of methods. You will find that you may use each method in varying circumstances.

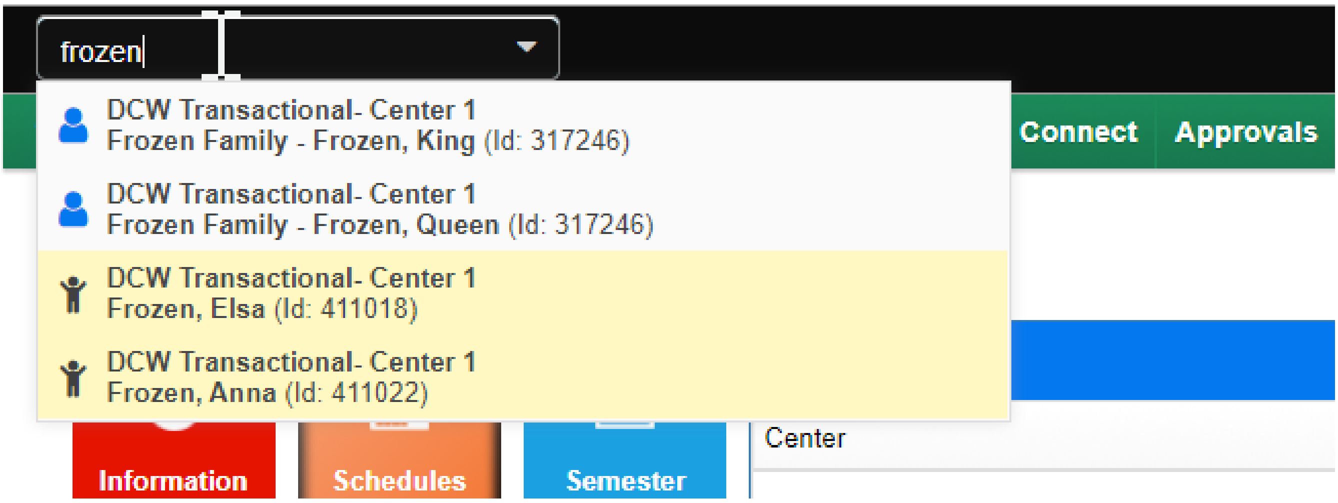
Method 1- Search Bubble

At the very top of the screen you will see the menu bar, this bar will display as you navigate through the system.   To the left you will see a search bubble.



In the search bubble you can enter a child's first name, last name, parents first name, parents last name, family name, family ID or child ID.   When you start typing results will begin to display- you must enter at least three characters for results to display.

When viewing the search results, the parent/guardian results will display in white, if you click on one of the white records you will be taken to the family's financial screen. The children that match the search criteria will display in yellow, if you select one of the children you will be taken to the child screen in the family's record. Only active families will display when using this search feature.



frozen

DCW Transactional- Center 1
Frozen Family - Frozen, King (Id: 317246)

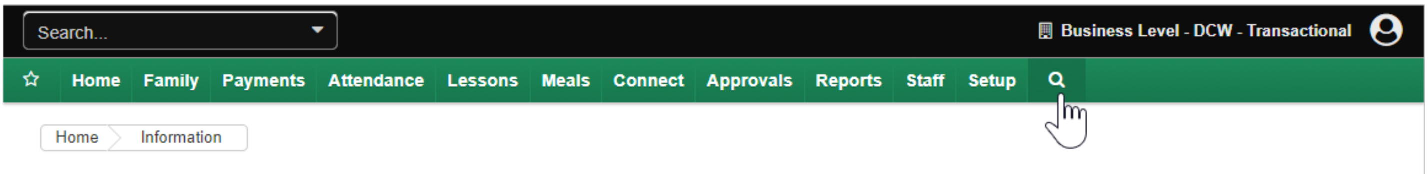
DCW Transactional- Center 1
Frozen Family - Frozen, Queen (Id: 317246)

DCW Transactional- Center 1
Frozen, Elsa (Id: 411018)

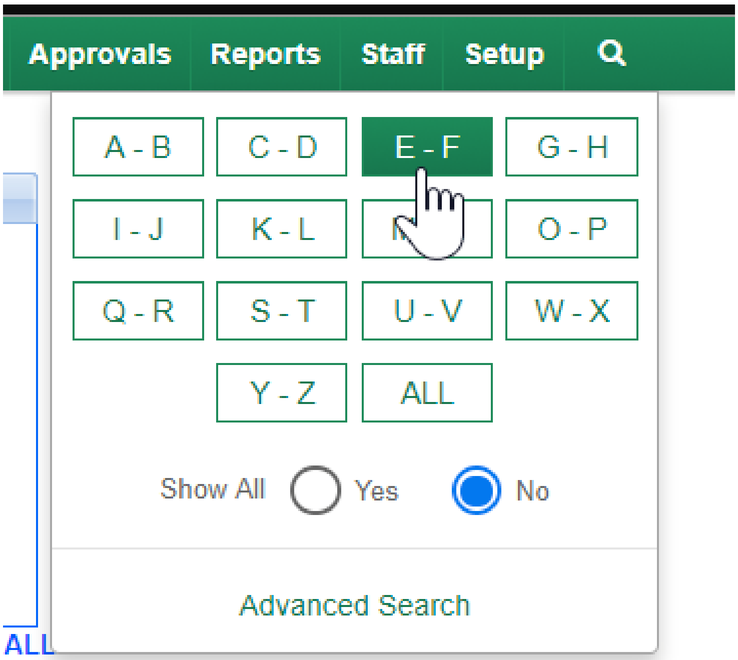
DCW Transactional- Center 1
Frozen, Anna (Id: 411022)

Method 2- A to Z, First Initial of Last Name Search

From the navigation bar, select the magnifying glass



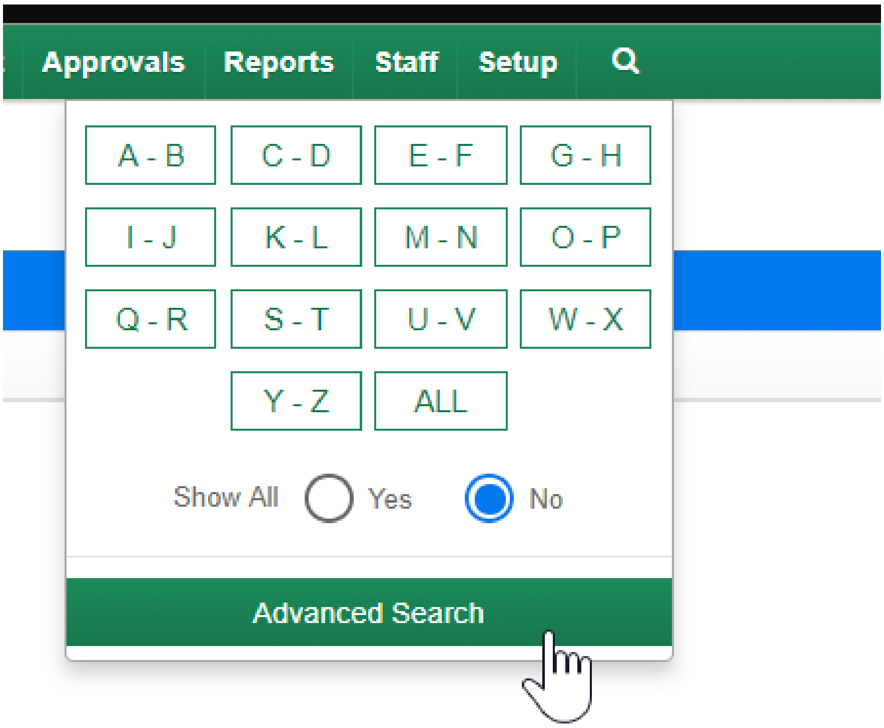
From the selection box, click on the first letter of the family's last name you would like to jump to, if you would like to see active AND inactive families select Show All, Yes -



This will take you to the family search screen, displaying families that match the conditions selected above.

Method 3- Advanced Search

Advanced Search allows users to search families by additional fields. From the navigation bar, select the magnifying glass and then select Advanced Search.



Show All ○ Yes ● No

Once Advanced Search is selected the search screen will appear.

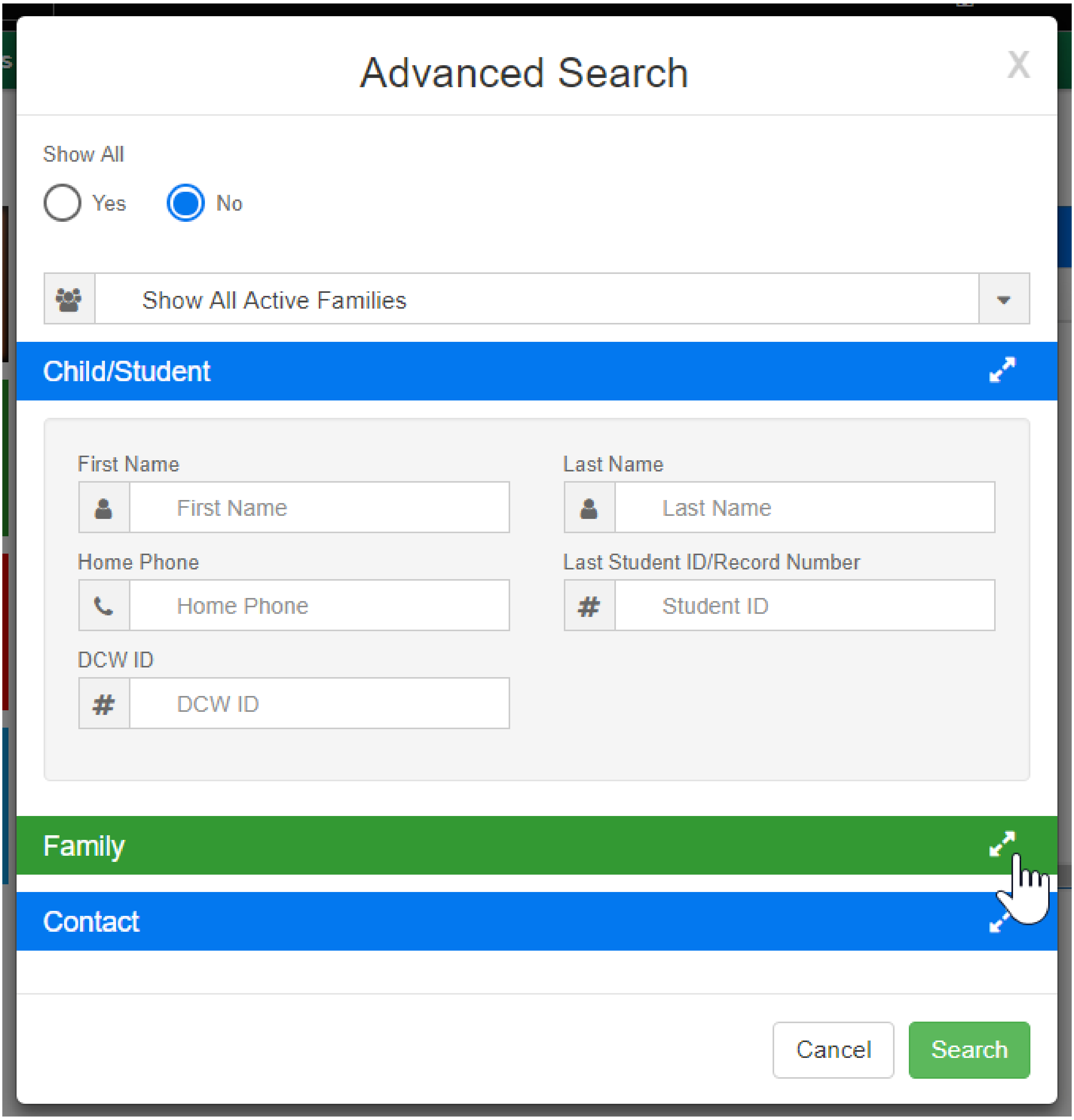
- Show All- Yes, Active AND Inactive families will display. No- ONLY active families will display
- Select if you would like to Show All Active Families or Show Active and Pending Enrollment

The next fields are your search criteria you are looking to search by- you can enter search terms in one or multiple fields.

Click on the expand icon to see available search criteria in each section, you can add search criteria in one or multiple sections

Child/Student Fields

- First Name- Child's first name
- Last Name- Child's last name
- Home Phone- Child's home phone number
- Last Student ID/Record Number- Child's SIS or external ID
- DCW ID- The child's assigned ID when they were created in our system


Advanced Search

Show All

○ Yes ● No

Show All Active Families

First Name: First Name

Last Name: Last Name

Home Phone: Home Phone

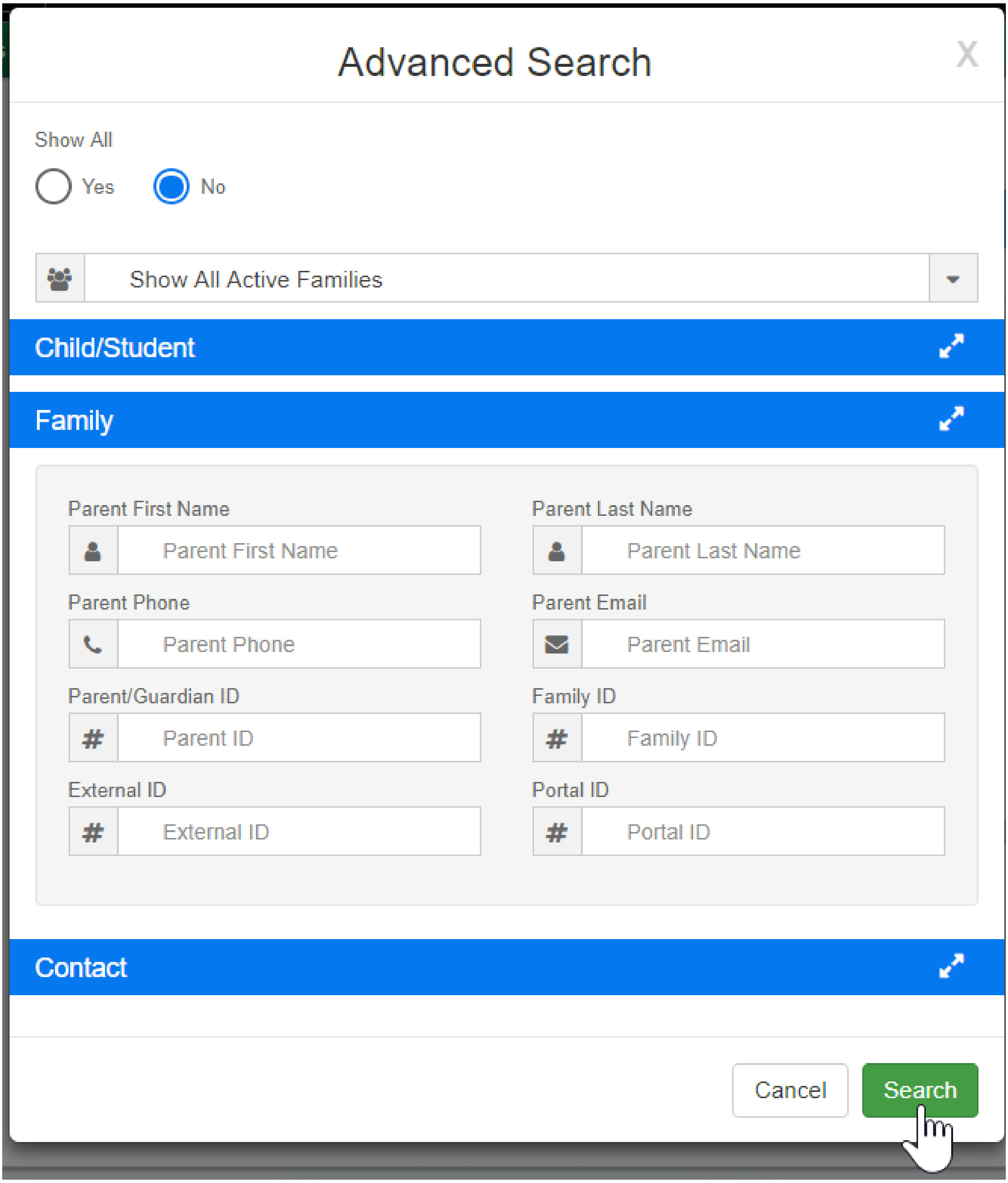
Last Student ID/Record Number: Student ID

DCW ID: DCW ID

Family Fields

- Parent First Name
- Parent Last Name
- Parent Phone
- Parent Email
- Parent/Guardian ID
- Family ID
- External ID

- Portal ID



Advanced Search

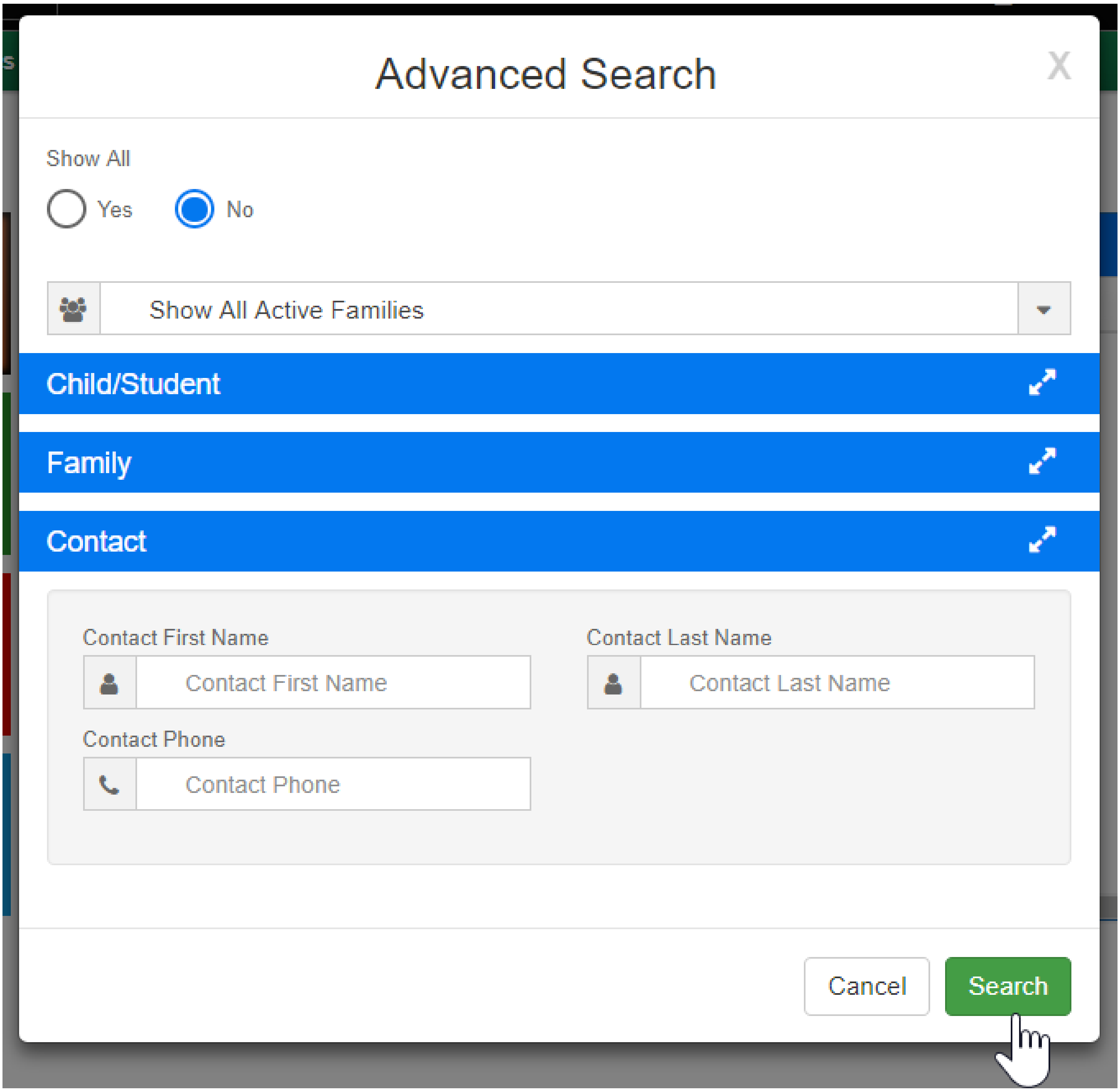
Show All

○ Yes ● No

Show All Active Families

Contact Fields

- Contact First Name
- Contact Last Name
- Contact Phone Number


Advanced Search

Show All

○ Yes ● No

Show All Active Families

Contact First Name: Contact First Name

Contact Last Name: Contact Last Name

Contact Phone: Contact Phone

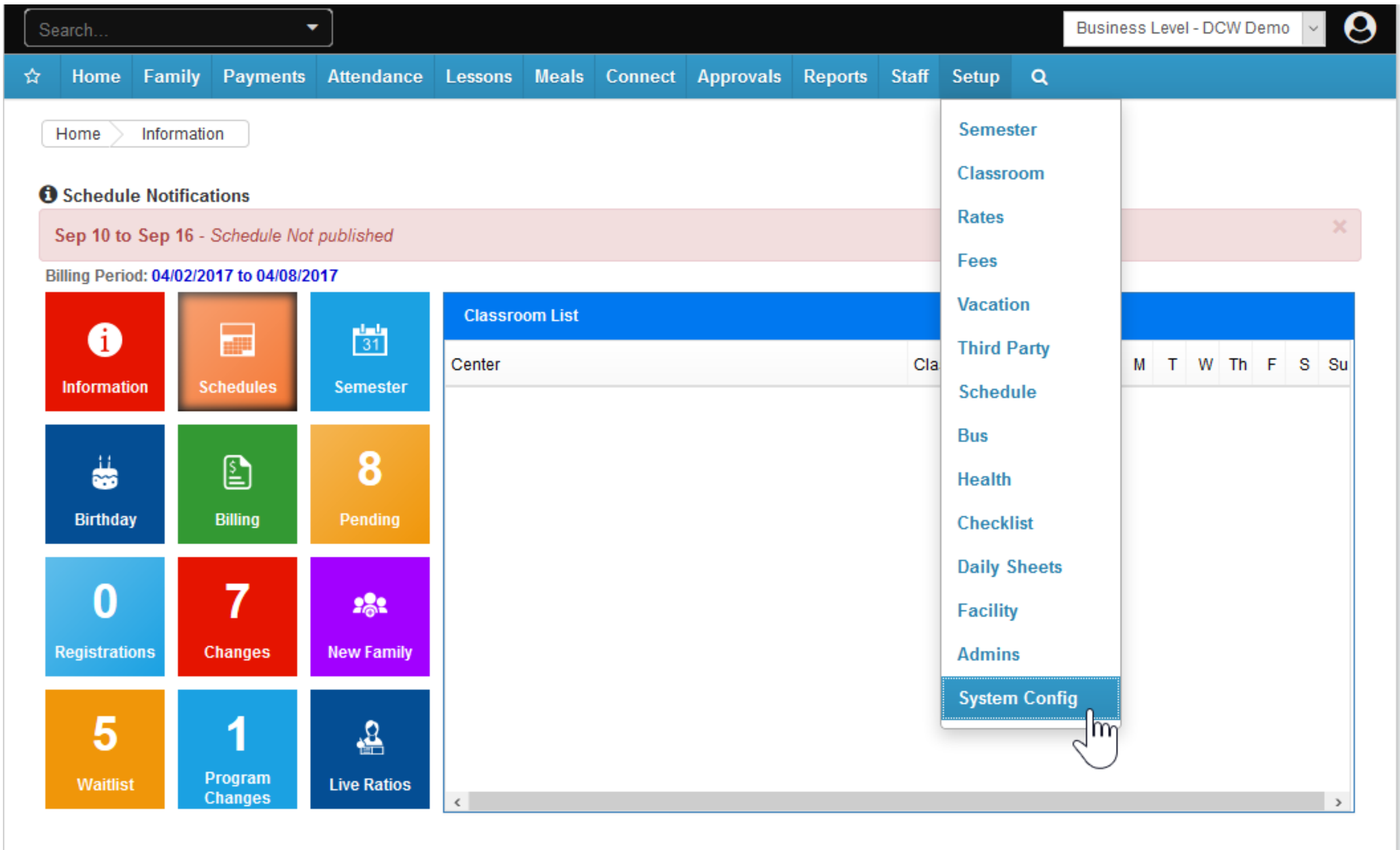
Once all criteria has been entered, select Search. The results will display.

General Configuration, Statement

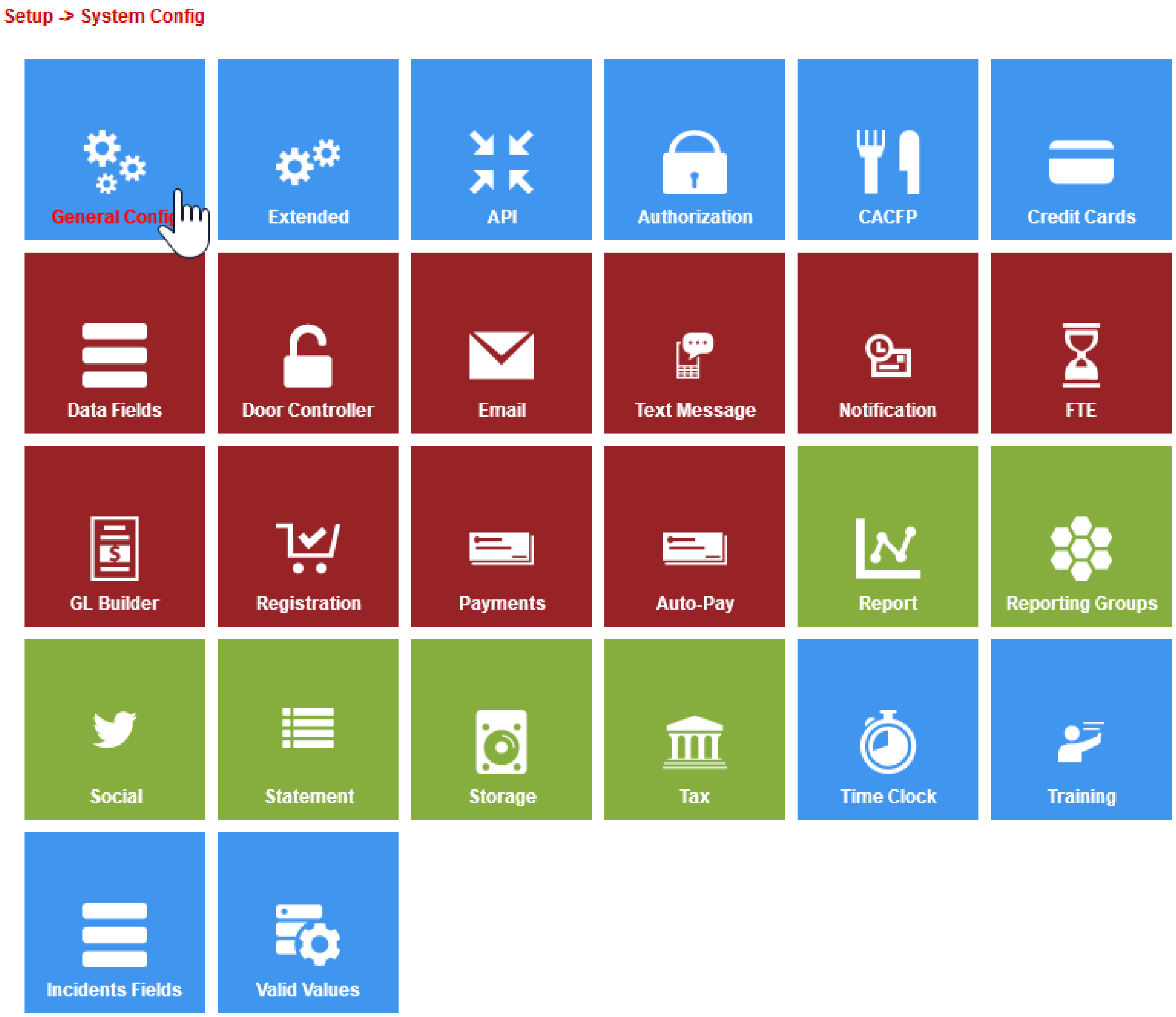
Last Modified on 09/27/2017 9:02 am EDT

Setup > System Config, General Config allows you to set generic settings for your site. This will be the first place you want to visit once you have logged in.

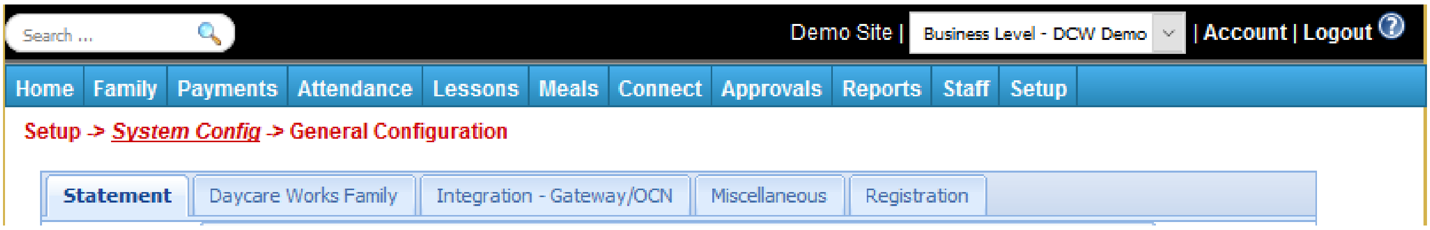
From the Setup menu select the System Config option



Then select the General Config tile



The first tab is the **Statement** tab.



In the **Tax ID** field enter your business' tax identification code (t*his tax identification code will be printed on billing statements for parents).*

Then select the billing period for the center in the **Billing Period** drop down list (Required)

- Defined Billing Periods allow centers the ability to generate billing periods and

determine when billing should be generated for families, this means that you only bill for one set period of time- usually if you ONLY bill weekly or ONLY bill monthly. This option allows you to recreate billing for that set period- which is helpful for reconciliation purposes.
- Transactional billing allows a center to have multiple monthly and weekly billing periods within one center, this may mean your center has a Preschool program that bills monthly and a School Age program that bills weekly.

The **Allow Multiple Tuitions** option allows you to select if you will have different types of programs for kids enrolled in your sites.

- Select Yes if your business allows a child to register for multiple classrooms, activities or events in the center in the Allow Multiple Tuitions drop down list.

The **Open Weekends** field allows you to select if your business is open on Saturday and Sunday.

- Select **Yes** if your business is open for children during the weekends

Start Date for Billing allows you to select the day you would like your week to start on.

- If your business is using parent managed calendars, select Sunday

If your business has an **hourly rate**, select the hourly rate in the **Allow Hourly Rate/Statement Text** drop down list. Then, enter a description of the hourly rate for parents in the text box (optional).

- Select how the hourly rate will be billed in the Hourly Rate drop down list. *Hourly rates can be billed based on attendance or on* schedule for the child.
    - None: Select None if the center has no hourly rates.
    - Hourly Billing: Select Hourly if billing is based on the total time spent in the center. *For example, 2:15 PM – 3:15 PM would be charged one hour.*
    - Strict Hourly Billing: Select Strict Hourly Billing if billing is based on the hour time spots spent in the center. *For example, 2:15 PM – 3:15 PM would be charged two hours, 2:00 PM - 3:00 PM & 3:00 PM - 4:00 PM.*
    - Half-Hour Billing: Select Half-Hour Billing if billing is based on the half hour

time spots spent in the center. *For example, 2:15 PM – 3:15 PM would be charged 2 half-hours.*
    - Half-Hour Strict Billing: Select Half Hour Strict Billing if billing is based on half hour time spots spent in the center. For example, 2:15 PM – 3:15 PM would be charged 3 half-hours, 2:00 PM - 2:30 PM, 2:30 PM - 3:00 PM, & 3:00 PM - 3:30 PM.

Rate Categories help businesses charge different rates for the same classroom based on the family's income level, child's age or center criteria. If your business will be using rate categories to determine what rate a child will be charged, select Rate Category in the **Rate Type** drop down list. If no rate categories will be setup in the system, select Normal.

Select Manual in the **Statements** drop down list to have billing processed manually by administrators in the system.

Select Version 2 in the **Family Statement Display** drop down list. This will enable administrators the ability to make Payment Corrections, Return Payments, and Payment Refunds. If those functions will not be enabled for administrators, select Normal.

Enter the amount of absent days children are allowed to have in the business in the **Allowed Absent Days** text box. Please note, there are other additional fields to enter absent days, based on the number of days a child is scheduled.

In the **Allow Statement Details to be Deleted** field, select Yes to allow statement details, such as adjustments or payments, to be deleted on a family's financial ledger by a Super User, items will only be able to be deleted during the current active billing period.

Payments Must be associated to Program helps to control if payments have to be associated to a room/program- if you want parents to be able to make prepayments you would want to select No from the drop down list.

In the **Allocate Payments** drop down list select Yes to allocate payments to specific charges, adjustments or fees on a family's billing statement.

The **Auto Late Fee** field allows you to have a late fee automatically added to a family account, a batch job would need to be set by Cirrus Group in order for this to automatically allocate. Select No if you do not want the fee to automatically be added.

Show **Detail Post Date** controls the level of detail a family can see on their ledger for posted transactions to show detail select Yes for balance only postings select No.

The **Allow Post Date Entry** option allows administrators to enter the date the payment was posted to the financial ledger for the family after the day- example if a payment was received two weeks ago- select yes if you can date the payment as of the receipt date two weeks ago- or no if the payment should be dated with today's date. This will impact reconciliation. (Recommended: Yes)

Auto Select Child Tuition section will automatically assign tuition rates to children for the classroom (based off of the classroom's default rate) . These rates can be overridden manually on the child's program/room assignment tab. (Recommended: Yes)

Auto Determine Discounts section if set to Yes/Corporate Only only corporate discounts will be automatically applied to families. If Yes is selected in the Auto Determine Discounts section on the Statement tab in the Configuration section, a Sibling discount will not be able to be removed from a child. If No is selected, the system will not automatically apply discounts for children in the center. (Recommended: No)

The **Allow Deposit Header** option allows administrators/users the ability to edit the date for a deposit (Payments > Deposits). (Recommended: Yes)

The **Allow Control Totals** to be Updated section allows administrators/users the ability to edit the control total and deposit number in the Payments > Deposit section. If No is selected, users must cancel a deposit if a change needs to be made to a deposit. (Recommended: Yes)

The **Allow Deposit Family Search** option allows administrator the ability to search for families including guardians and contacts for a family, for deposit entry under Payments > Deposit. (Recommended: Yes)

The **Include both Parents in Search** option enables the system to display both guardians when searching for payments in the Payments > Deposit section. (Recommended: Yes)

The **Allow Deposit Agency Payment** option enables the ability to receipt third party/sponsor payments to under Payments > Deposit. (Recommended: Yes)

The Deposit – Auto Break of Credit Cards section determines if credit card payments are separated from other payment methods when posting a deposit. This is only used when using the deposit section to record credit cards that have not processed through a payment gateway in the system. (Recommended: No)

The Deposit – Allow Delete of Payment in the Receipt section determines if an administrator can delete a payment after creating a receipt on the deposit. (Recommended: No)

The Sponsor Journal – Allow Agency Payment Entry option allows HOD (third party payments) deposits to be visible on the Deposit section in the system. (Recommended: Yes)

If a discount should be displayed as a credit on a family's financial ledger, select Yes in the **Display Discount as Credit on Customer Statement** section. If No is selected, a discount will be displayed as an adjustment to a family's financial ledger.

The **Allow Payments and Fees** to be edited field determines if users are able to edit payments or fees on a family's financial ledger.

The **Remove Attendance Less Than** section helps prevent charging families attendance for children on accidental entry- enter time in number of seconds.

The **Payment Due Date** text box determines the number of days a payment is due within.

Enter any additional messages that will be displayed on the printed copies of the customer's billing statement in the **Statement Footer** section. This section can be used to announce or advertise upcoming events in the center.

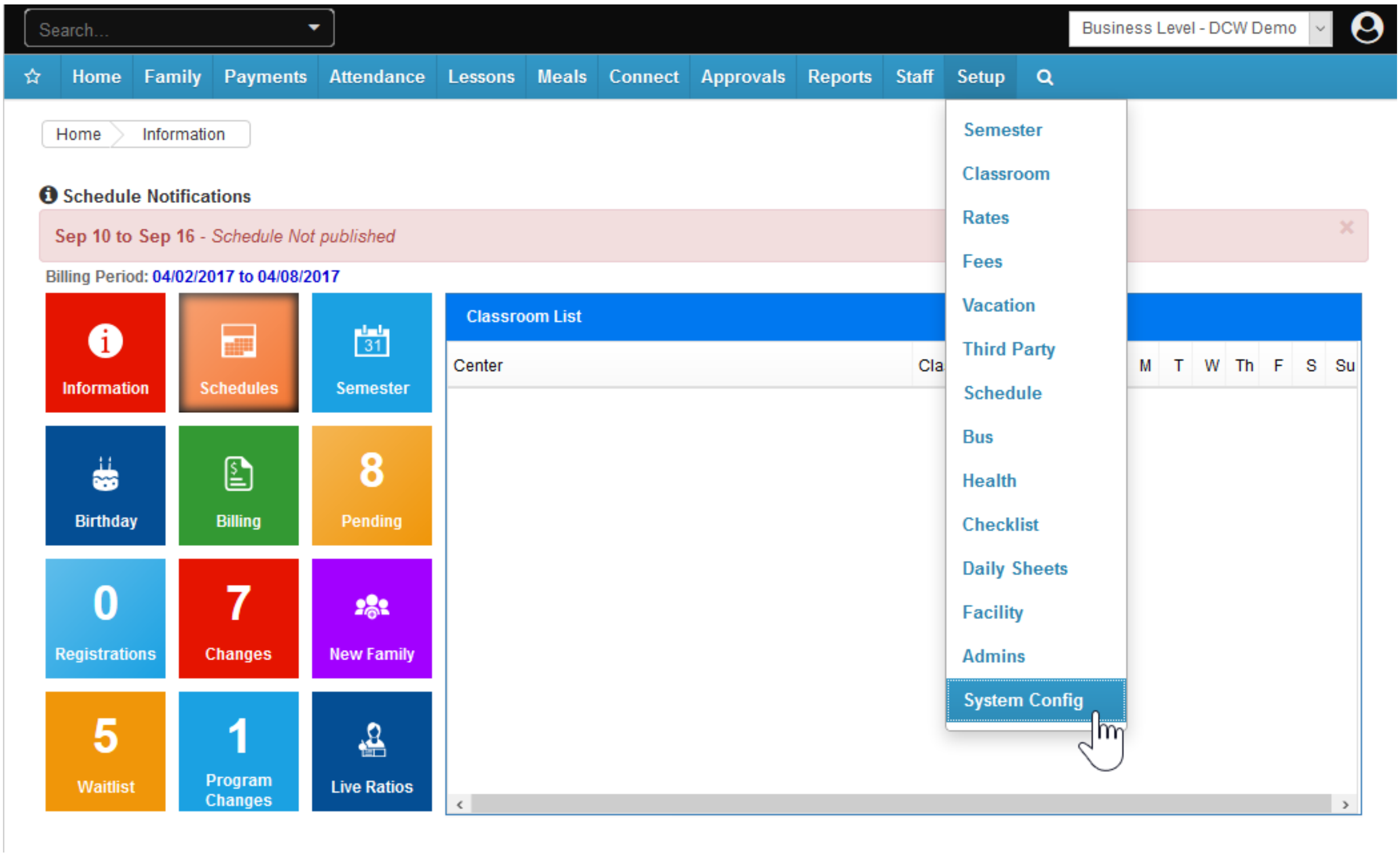
Click here to go to the next tab's configuration page!

General Config, Daycare Works Family

Last Modified on 03/14/2018 9:39 am EDT

Setup > System Config, General Config allows you to set generic settings for your site. This will be the first place you want to visit once you have logged in.

From the Setup menu select the System Config option

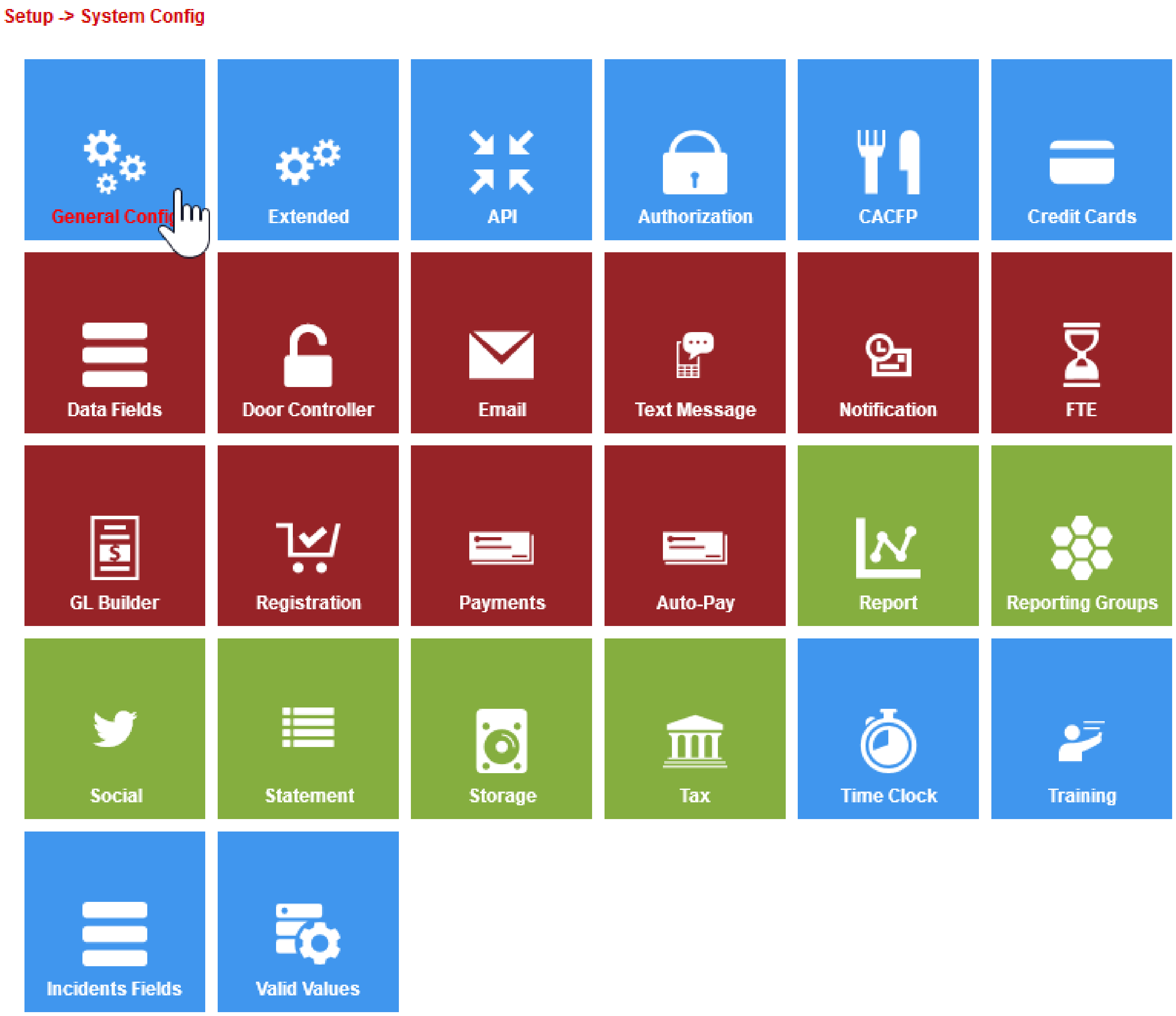


Schedule Notifications

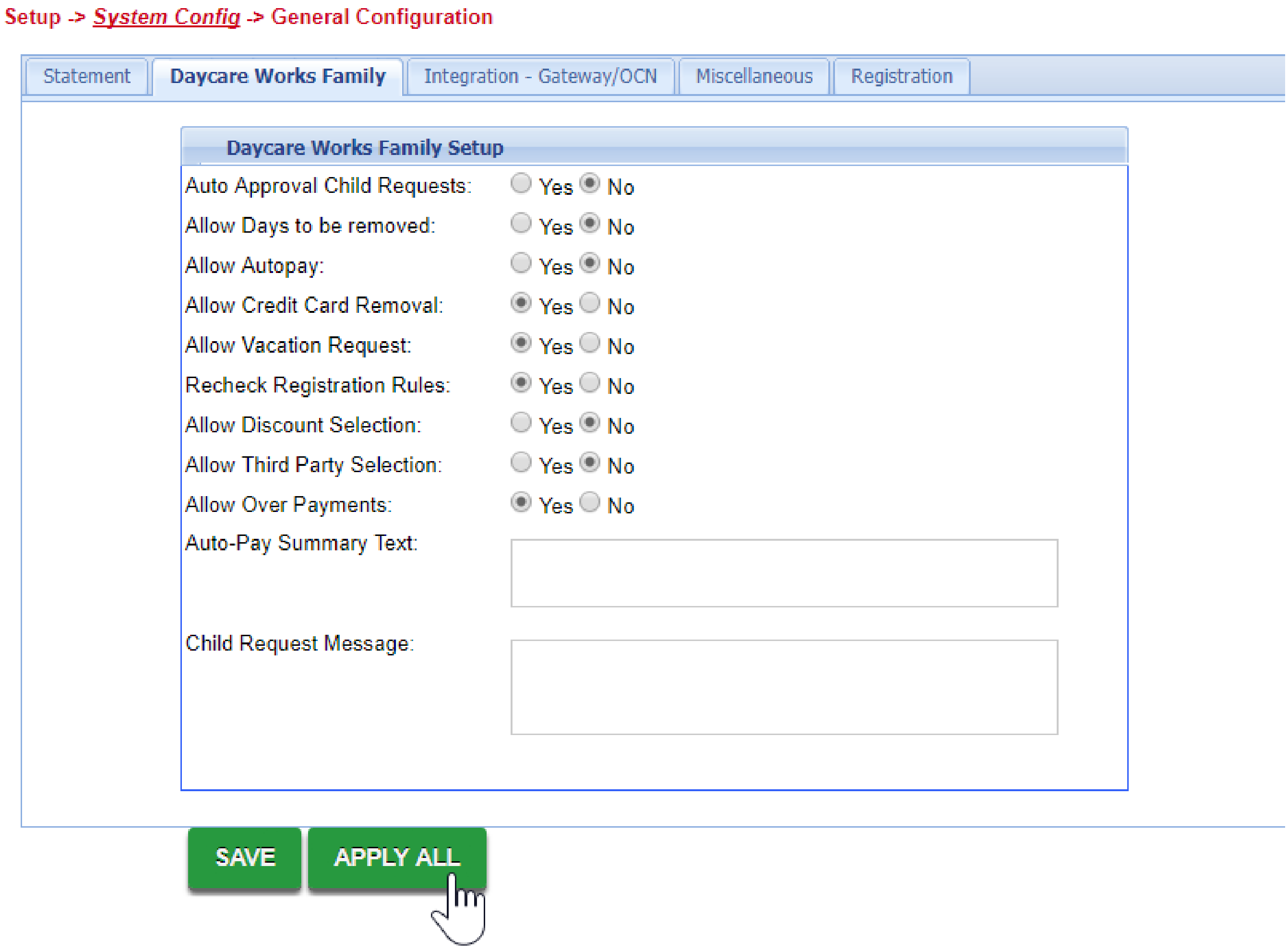
Sep 10 to Sep 16 - *Schedule Not published*

Billing Period: 04/02/2017 to 04/08/2017

Then select the General Config tile



Then select Daycare Works Family tab



Daycare Works Family Setup

Auto Approval Child Requests: ○ Yes ● No
Allow Days to be removed: ○ Yes ● No
Allow Autopay: ○ Yes ● No
Allow Credit Card Removal: ● Yes ○ No
Allow Vacation Request: ● Yes ○ No
Recheck Registration Rules: ● Yes ○ No
Allow Discount Selection: ○ Yes ● No
Allow Third Party Selection: ○ Yes ● No
Allow Over Payments: ● Yes ○ No
Auto-Pay Summary Text:
Child Request Message:

Auto Approval Child Requests option allows parent requested changes from the portal to automatically approve. To prevent changes for the child's personal information submitted by guardians through the Connect/Parent Portal from automatically being approved, select No. If a guardians updates their information or a contact's information, it will automatically be approved by the system. An email is sent to the email address setup in the Contact Email section of the General tab for the center for any updates, including child, guardian and contact updates. (Recommended: No)

Allow Days to be Removed controls if guardians can edit a classroom assignment for a child's classroom through the Connect/Parent Portal. (Recommended: No)

Allow Auto-pay controls if a parent is able to setup auto-pay through the Connect/Parent portal. (Recommended: Yes)

Credit Card Removal determines if guardians have the ability to remove a previously setup reoccurring payment method from the auto-pay section in the Connect/Parent Portal. (Recommended: Yes)

Allow Vacation Request controls if guardians have the ability to submit an absent or vacation request through the Connect/Parent Portal. (Recommended: Yes)

Recheck Registration Rules controls if the system checks registration information for children every time the child registers for a classroom. (Recommended: Yes)

Allow Discount Selection allows guardians the option to select a discount through the Connect/Parent Portal. (Recommended: No)

Allow Third Party Selection allows guardians the option to select a third party/sponsor through the Connect/Parent Portal. (Recommended: No)

Allow Over Payments section can allow guardians the ability to pay beyond their current outstanding balance through the Connect Portal.

The **Auto-Pay Summary text** box allows for a custom message to display to parents after a credit card or bank account is setup for a reoccurring payment.

The **Child Request Message** text will display when a guardian submits a request to change a child's personal information.

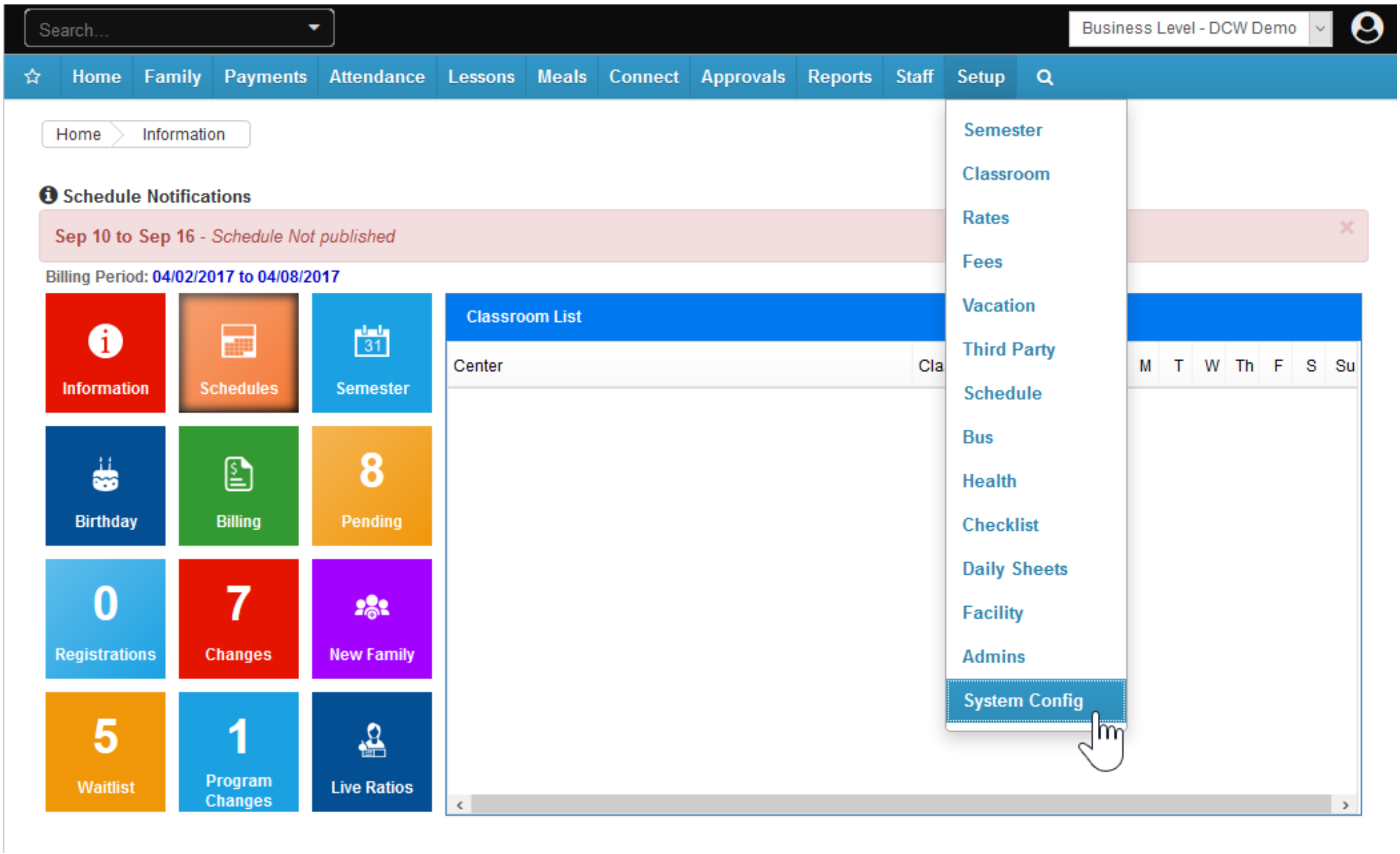
☐Click here to go to the Integration- Gateway/OCN configuration tab!

General Config, Integration-Gateway/OCN

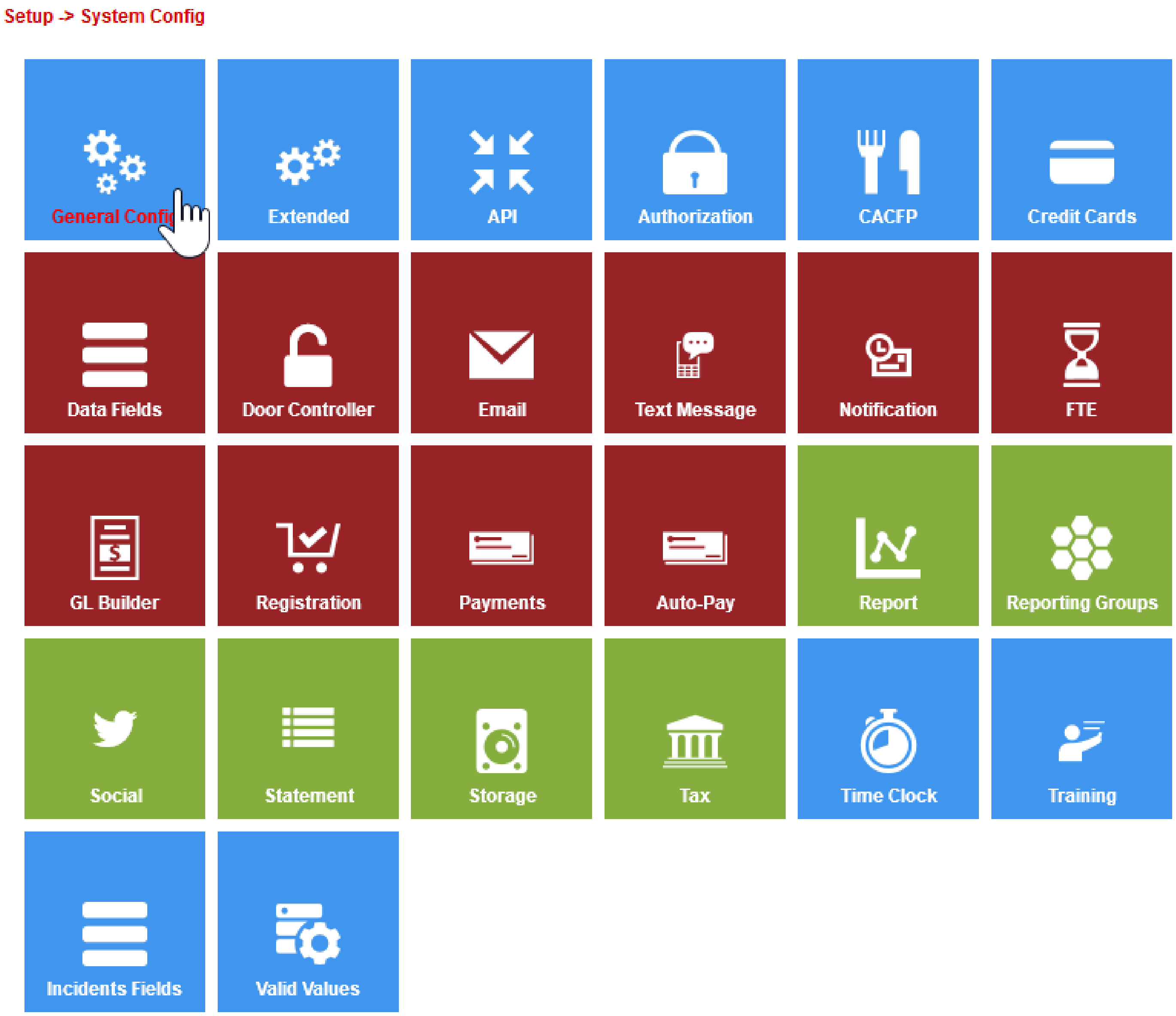
Last Modified on 03/14/2018 9:39 am EDT

Setup > System Config, General Config allows you to set generic settings for your site. This will be the first place you want to visit once you have logged in.

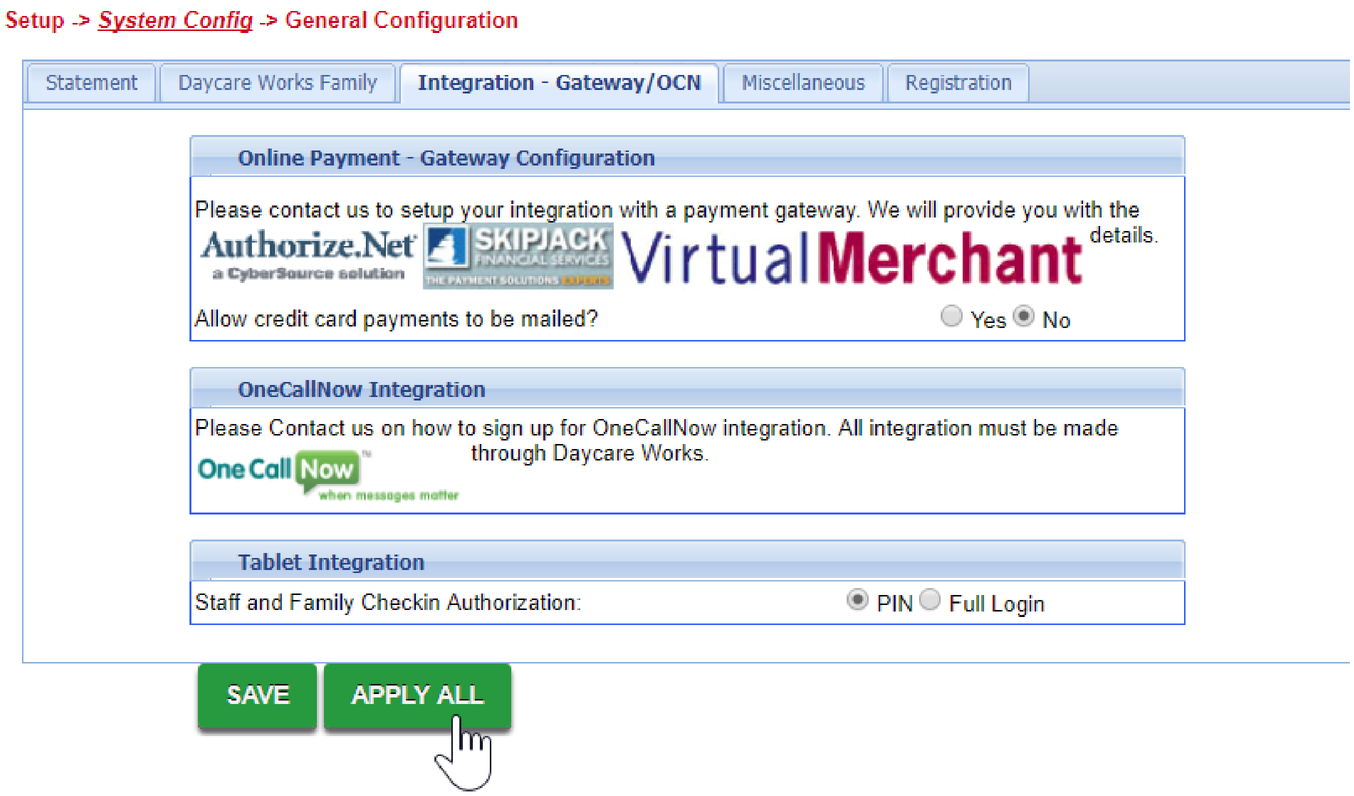
From the Setup menu select the System Config option



Then select the General Config tile



Then select the Integration- Gateway/OCN tab



Setup -> System Config -> General Configuration

Online Payment - Gateway Configuration

Please contact us to setup your integration with a payment gateway. We will provide you with the details.

Allow credit card payments to be mailed? ○ Yes ● No

OneCallNow Integration

Please Contact us on how to sign up for OneCallNow integration. All integration must be made through Daycare Works.

Tablet Integration

Staff and Family Checkin Authorization: ● PIN ○ Full Login

Allow credit card payments to be mailed option can allow a credit card form to be displayed on the customer's statement. *(Recommended: No)*

OneCallNow is a phone messaging service that can deliver phone calls or text messages to a large number of families within the center within minutes. Click here to find out more about OneCallNow - if you are interested in setting up this integration please contact your implementation specialist or customer service.

In the Tablet Integrations section either PIN or Full Login can be used for check in. If your site is using the InSite Select application for parent or staff logins, select PIN in the Staff and Family Check in Authorization section. If using older versions of the checkin feature, you have the option of selecting PIN or Full Login to allow parents to sign their children into your Center's touch screen computer using their the portal ID and password. *(Recommended: PIN)*

Click Apply All to save settings to all centers.

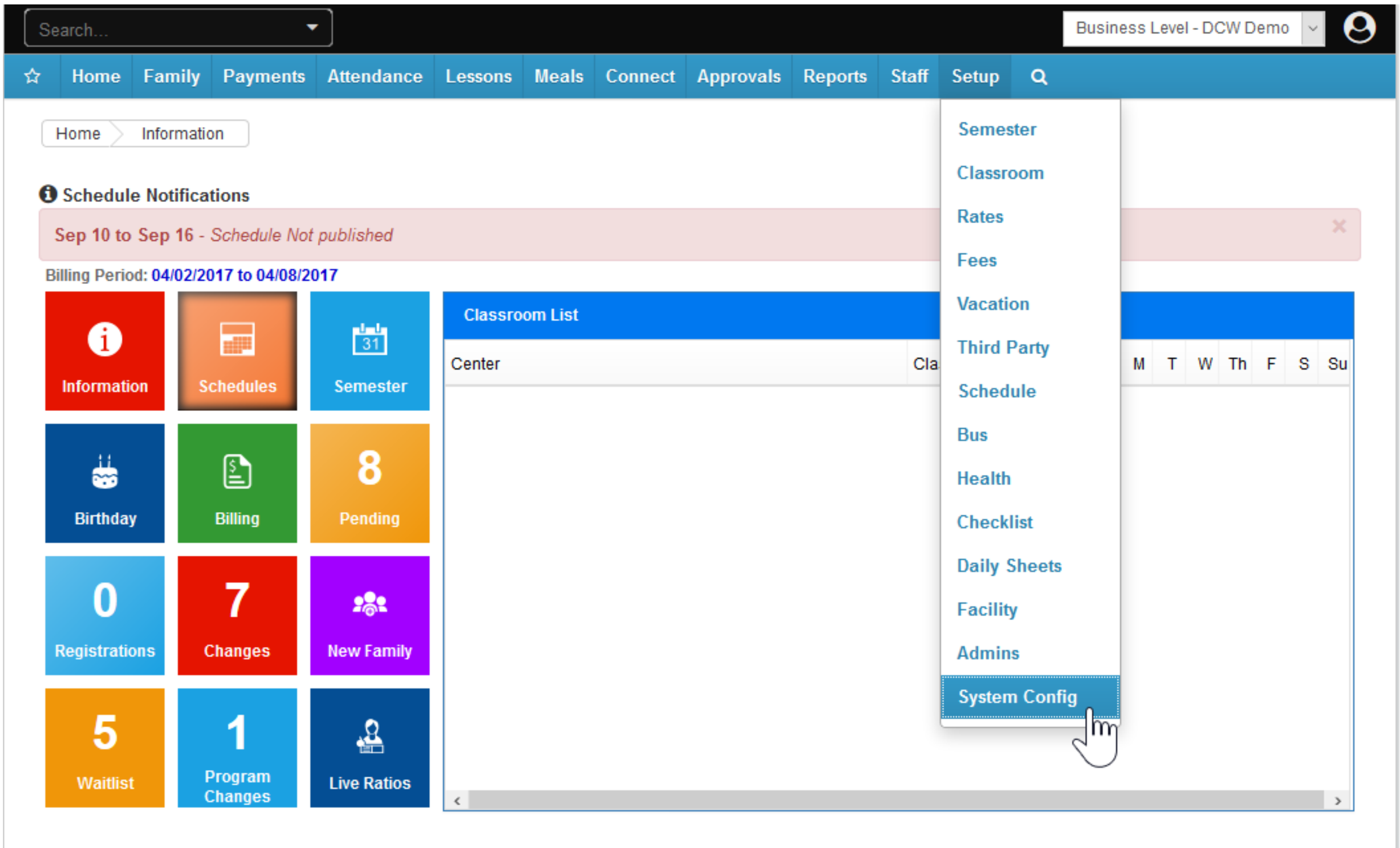
□Click here to see the Miscellaneous General Config settings!

General Config, Registration

Last Modified on 04/30/2018 7:46 am EDT

Setup > System Config, General Config allows you to set generic settings for your site.

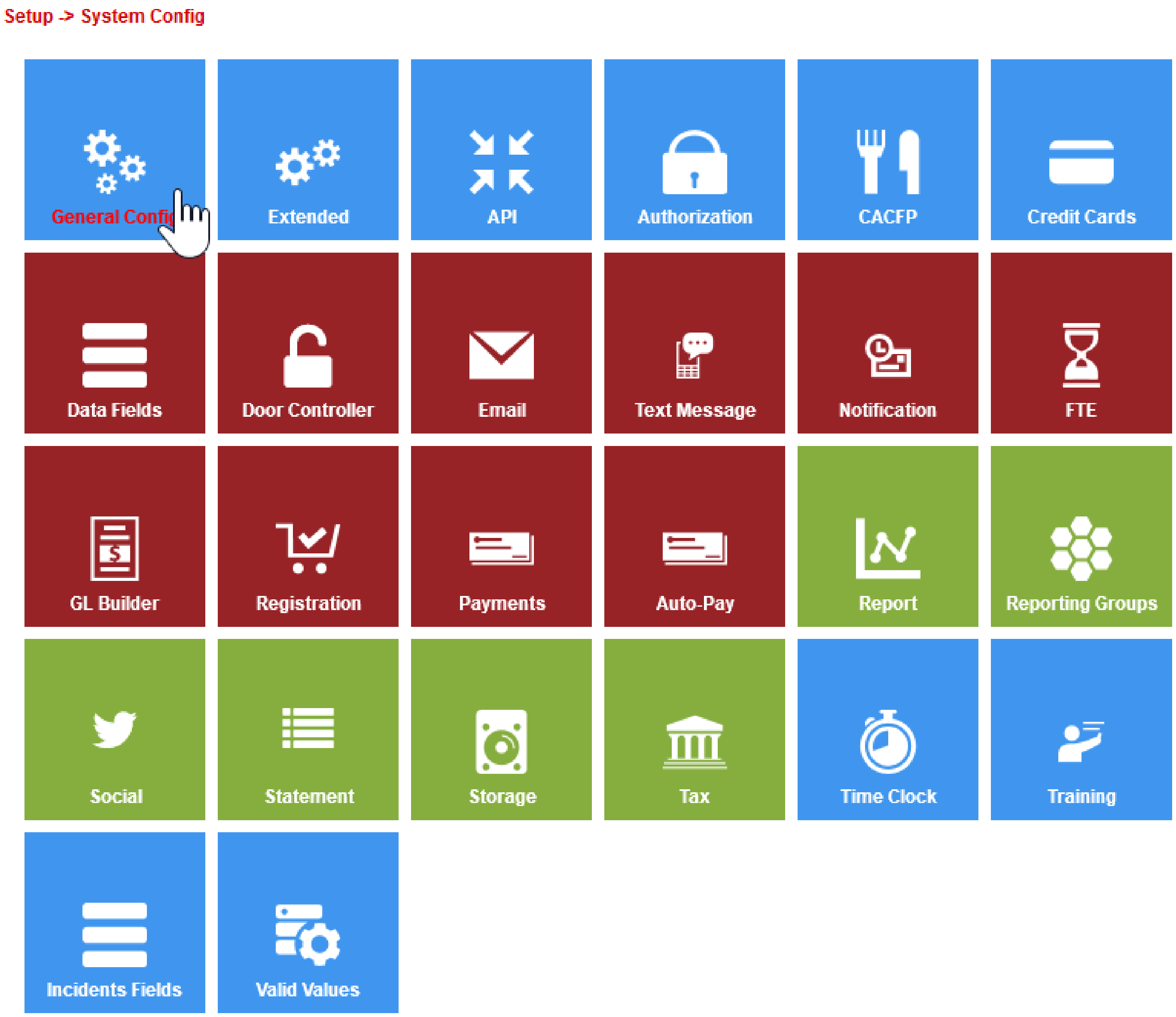
From the Setup menu select the System Config option



Sep 10 to Sep 16 - *Schedule Not published*

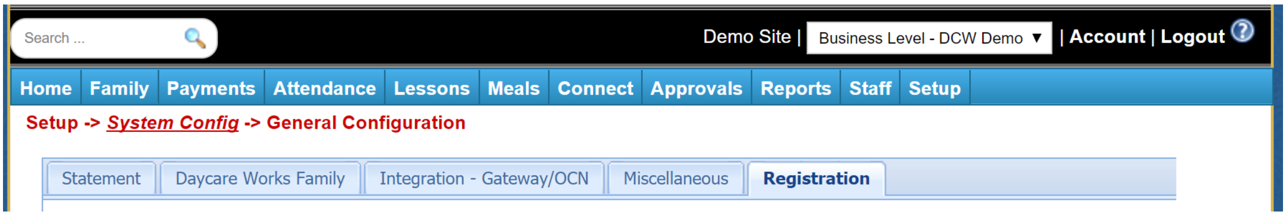
Billing Period: 04/02/2017 to 04/08/2017

Then select the General Config tile



Setup -> System Config

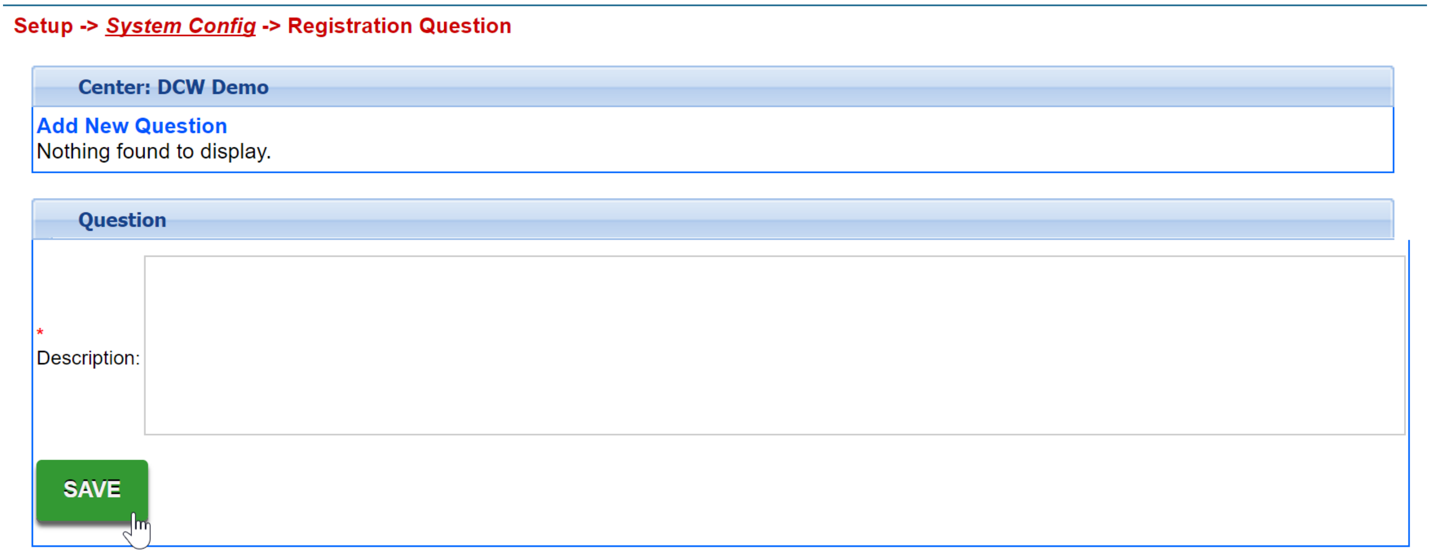
Then select the Registration tab



Setup -> System Config -> General Configuration

To set business level wide confirmation questions select the Registration Confirmation Questions link.

Enter the question in the text box and press Save. These Questions will display when a parent is completing registration, the questions should be confirmation type questions- I agree to, I understand etc.



Nothing found to display.

* Description:

On the Registration tab, you can also enable basic registration options-

Allow Registration Online if set to yes allows parents to register online in general.

Allow Event Registrations Online if set to yes allows parents to register online for Event type rooms/programs.

Registration Credit Charge allows you to select when credit cards will actually process through to the gateway. NOTE: From the New Registration page when parents register online and pay their card is immediately processed.

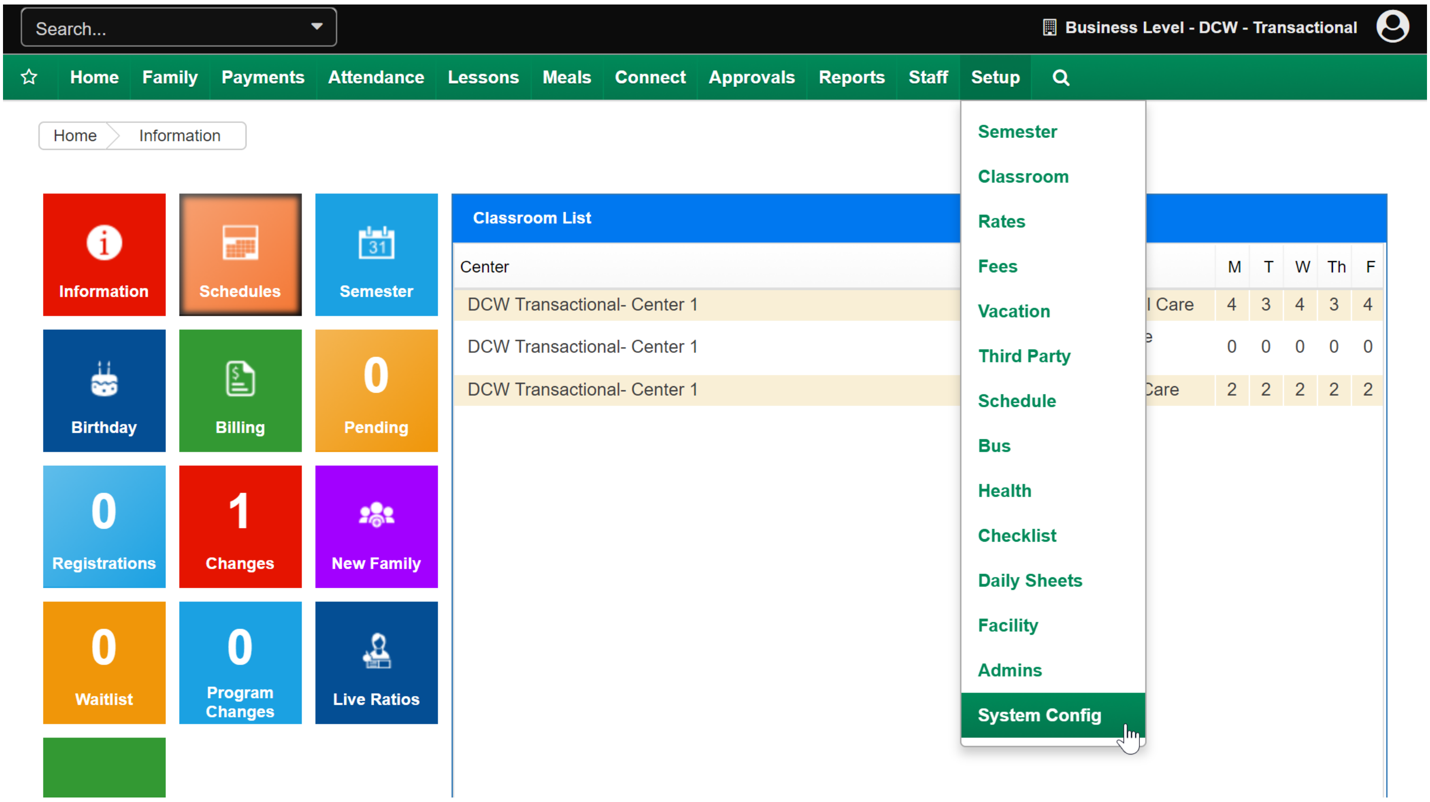
Click here for even more registration configuration options!

Types of Notifications

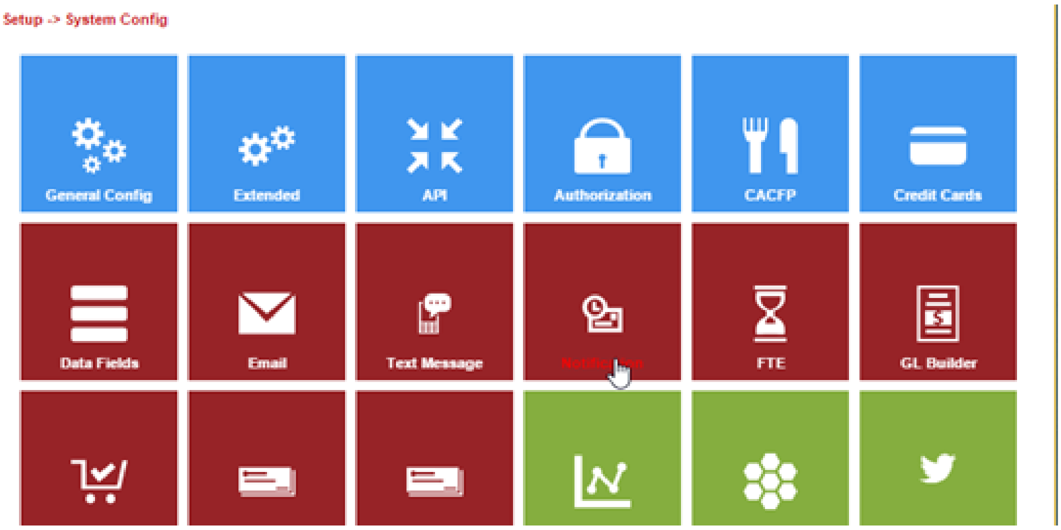
Last Modified on 10/15/2018 1:51 pm EDT

Notifications in the system can come in the format of email communication or eventually texting or phone calls (through additional third party setup).

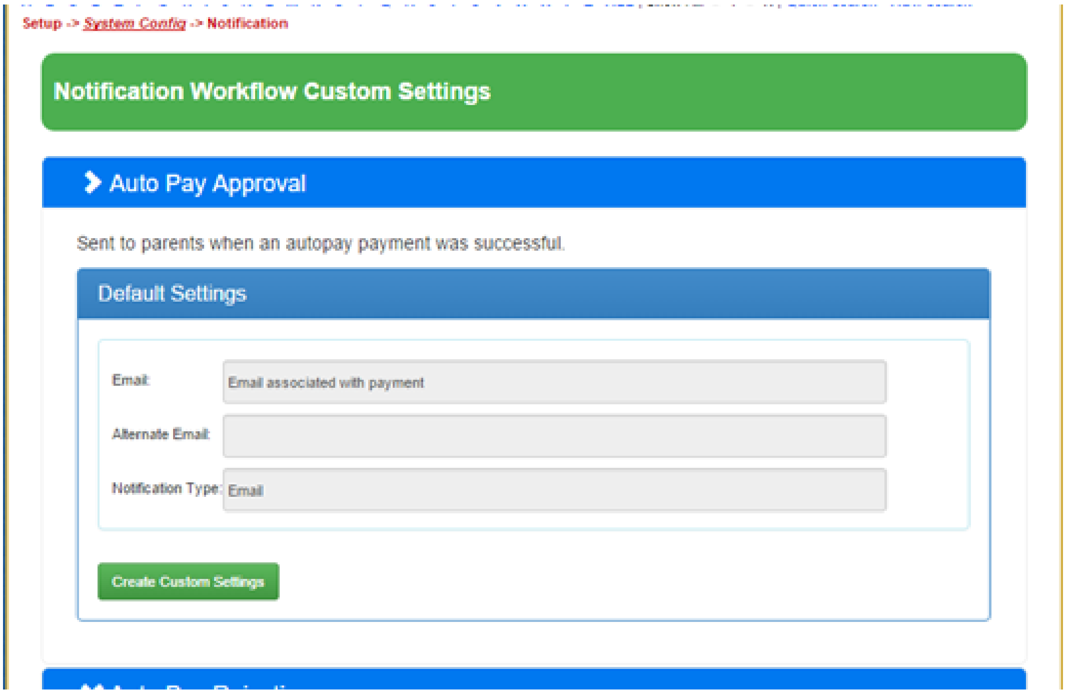
To view the types of emails that are sent out automatically from the system- when, from who, to who and to set custom routing options go to Setup > System Config.



Then click on notifications



After clicking on the header for each email type, a description of the email and the default settings for each will display.



Setup -> System Config -> Notification

Notification Workflow Custom Settings

Auto Pay Approval

Sent to parents when an autopay payment was successful.

Default Settings

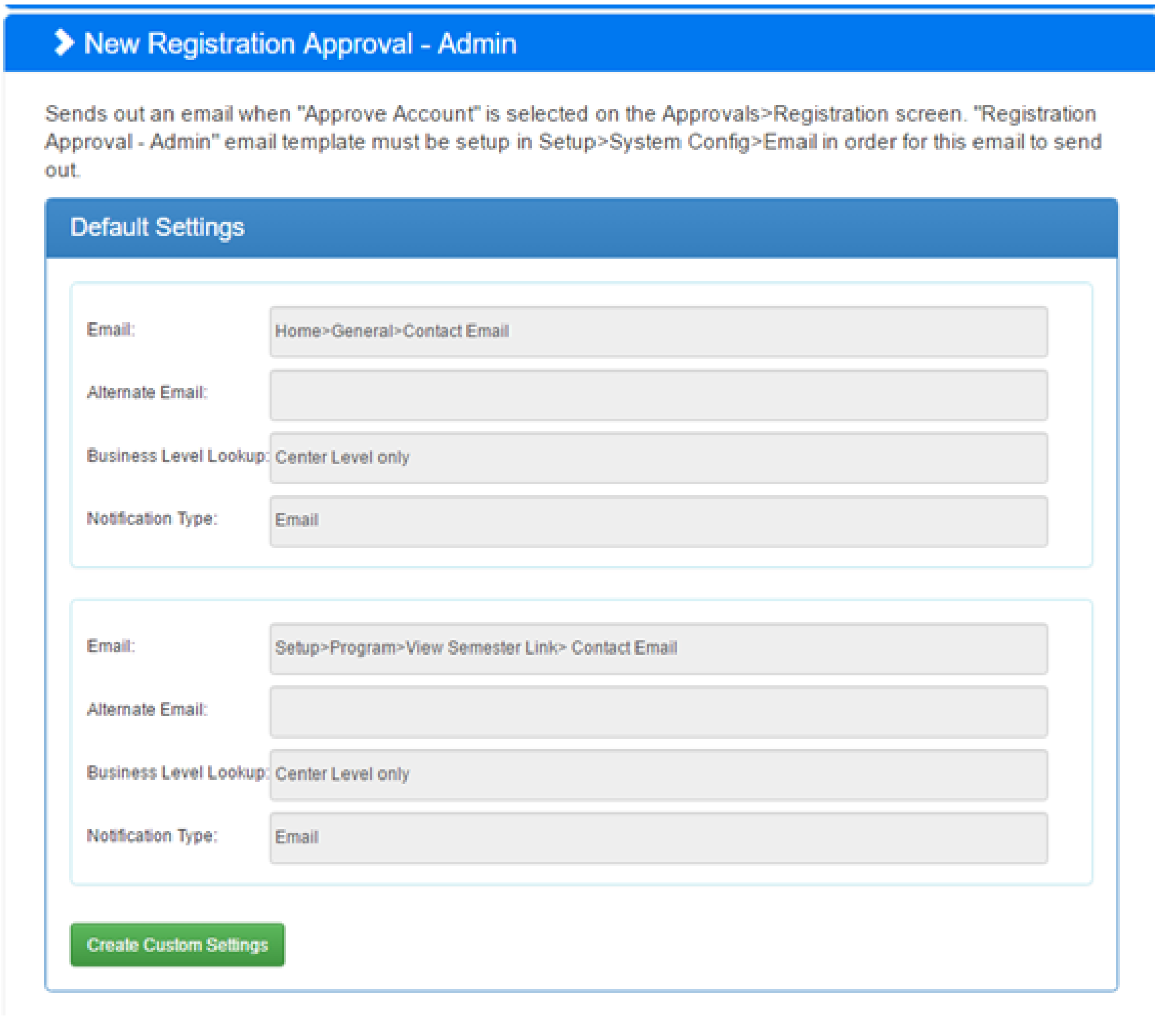
Email: Email associated with payment

Alternate Email:

Notification Type: Email

Some of the default settings can be adjusted. Available options for each template type can be seen by clicking the Create Custom Settings button. This is mostly helpful on emails that would typically go to admin level users.

For example- once the header for the New Registration Approval- Admin email is selected, you will see a description of the email, how to adjust the verbiage and who the email is sent from/to. Click on the Create Custom Setting option to make changes/adjustments.



New Registration Approval - Admin

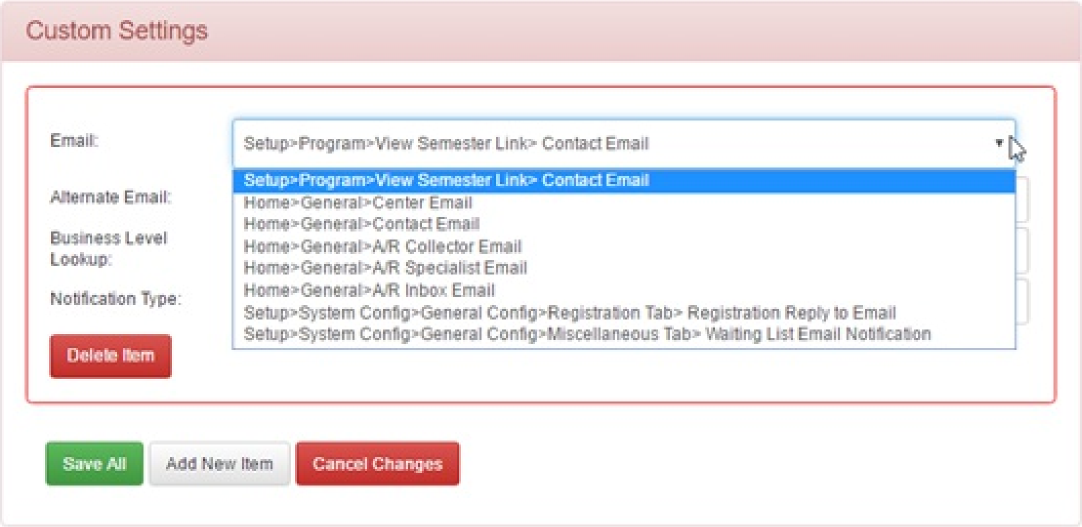
Sends out an email when "Approve Account" is selected on the Approvals>Registration screen. "Registration Approval - Admin" email template must be setup in Setup>System Config>Email in order for this email to send out.

Default Settings

Email: Home>General>Contact Email
Alternate Email:
Business Level Lookup: Center Level only
Notification Type: Email

Email: Setup>Program>View Semester Link> Contact Email
Alternate Email:
Business Level Lookup: Center Level only
Notification Type: Email

When the drop down box next to Email is select the option for who the email will send to is displayed- this information includes the directions for where to add/edit detail. In this example, I can select a different default email-



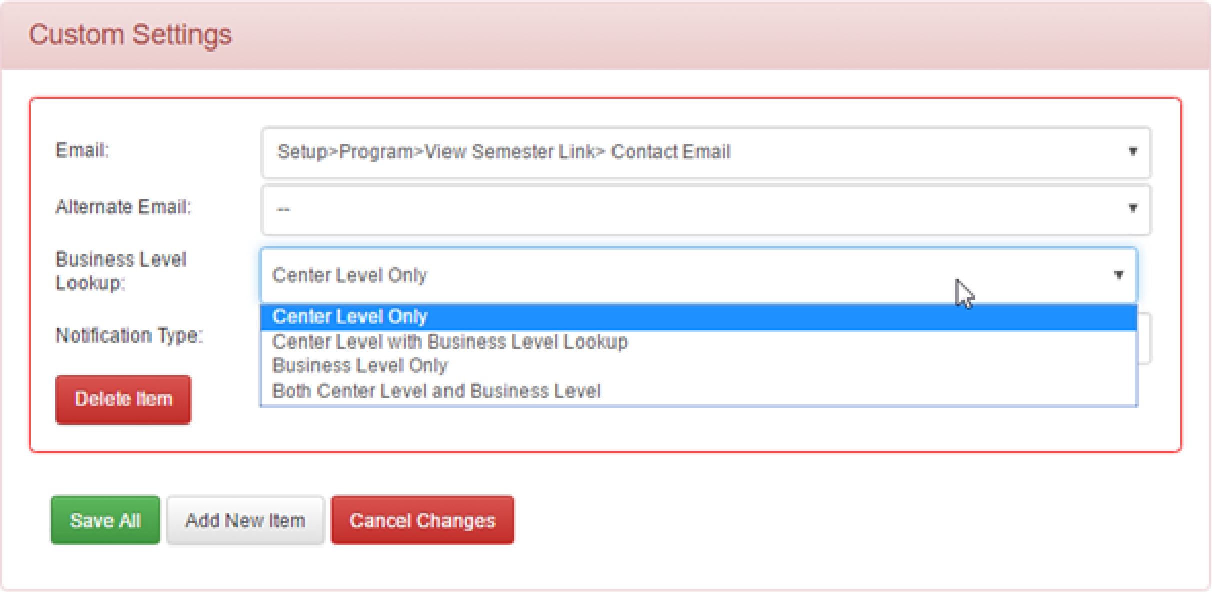
Custom Settings

Email: Setup>Program>View Semester Link> Contact Email

- Setup>Program>View Semester Link> Contact Email
- Home>General>Center Email
- Home>General>Contact Email
- Home>General>A/R Collector Email
- Home>General>A/R Specialist Email
- Home>General>A/R Inbox Email
- Setup>System Config>General Config>Registration Tab> Registration Reply to Email
- Setup>System Config>General Config>Miscellaneous Tab> Waiting List Email Notification

Alternate Email:
Business Level Lookup:
Notification Type:

Or even add in an alternate email source if applicable, then select where the system should look for the email detail-



Email: Setup>Program>View Semester Link> Contact Email

Alternate Email: --

Business Level Lookup: Center Level Only

- Center Level Only
- Center Level with Business Level Lookup
- Business Level Only
- Both Center Level and Business Level

Notification Type:

Once this detail has been updated choose Save All.

☐ Click here to see how to update system defaulted templates!

Registration Setup Checklist

Last Modified on 03/13/2018 8:37 am EDT

Whether you are setting up registration for the first time or your are editing registrationfor a new semester make sure you review the items below so that your categories, rooms and room /semesters are ready to go!

☑ Navigation:Setup > Room, Click on Category Name

- Review Description- this will display when families first arrive on the registrationpage
- Review Start Page Text- this will display when families first arrive on the registration page
- Review Finishing Text- this will be displayed to parents when they complete registration

☑ Navigation: Setup > Room, Click on Room Name

- Review Description- this will display when families select a category
- Review Finishing Text- this will be displayed to parents when they complete registration

☑ Navigation: Setup > Room, Click on Registration Setup under Category Name OR Room Name (if you are using category registration setup options DO NOT SAVE room level registration setup questions)

- Review questions that are displayed, hidden or required

☑ Navigation: Setup > Semester, Select semester from drop down menu

- Verify costs
    - Semester Cost
    - Semester Additional Participant Cost

☑ Navigation: Setup > Semester, Click on Blue I next to semester name

- Update start/stop time

- Update Enrollment Date
- Update Capacity

☑ Navigation: Setup > System Config, Email

- Add verbiage to desired templates
  - registration Confirmation
  - registration Approval
  - registrationRejection

☑ Navigation: Setup > System Config, Data Fields

- Update Verbiage around any questions asked during registration process

☑ Navigation: Setup > Admins, Setup Roles

- Select Family Portal (Not Allowed)
  - Review DCW Connect- Personal Change Fields
  - Review DCW Connect - Menu
- Select Family Portal Contacts (Not Allowed)
  - Review DCW Connect- Personal Change Fields
  - Review DCW Connect - Menu

☑ Navigation: Setup > System Config, Registration

- Add Reconfirmation date and text
- Review/Add Start Page Text- this will display when families first arrive on the registration page
- Review Finishing Text- this will be displayed to parents when they complete registration

---

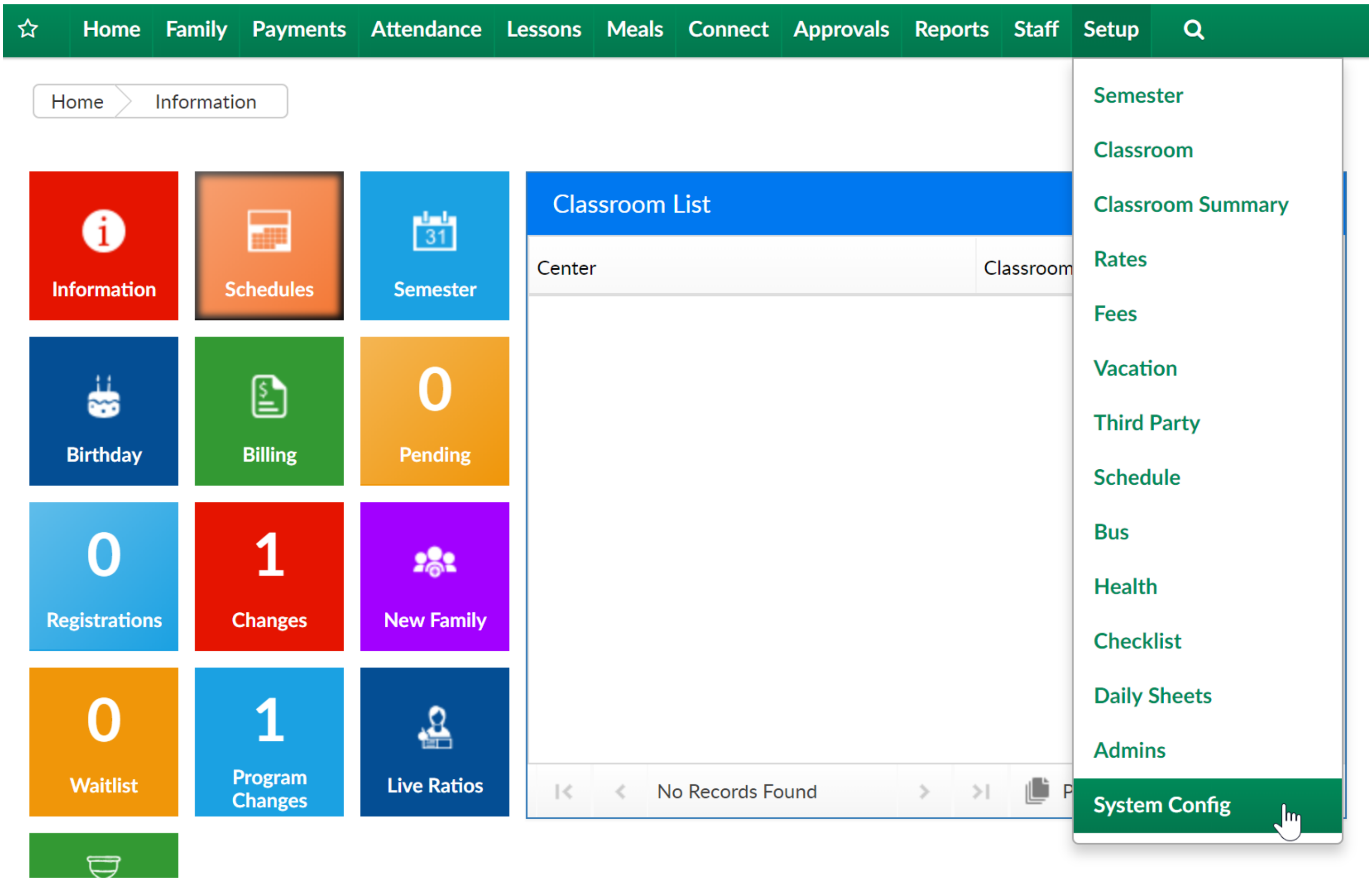
Click here for a file to track your progress!

System Config > Registration

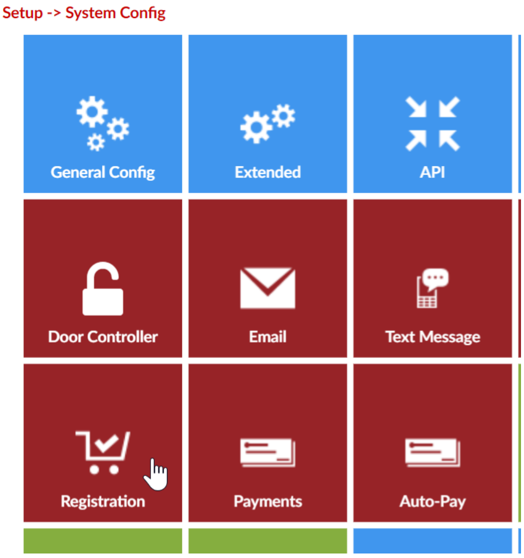
Last Modified on 04/30/2018 7:47 am EDT

The Setup > System Config, Registration option allows users to customize the family registration experience.

From the Setup menu, select System Config.

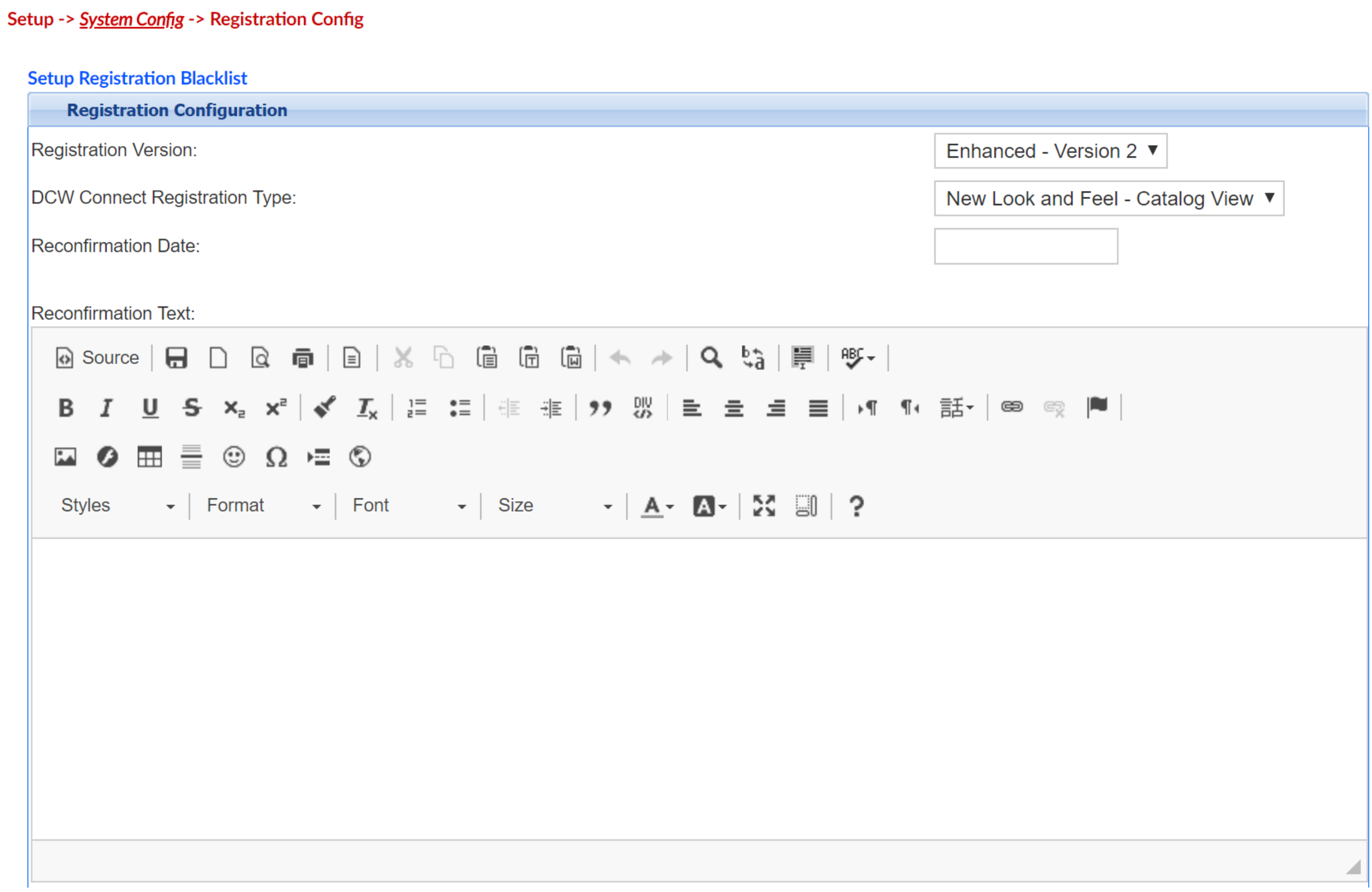


Then select Registration-



The first section contains the following items-

- Registration Version- this should always be set to Enhanced- Version 2 for the most up to date registration view.
- DCW Connect Registration Type- this should always be set to New Look and Feel- Catalog View for the most up to date registration view.
- Reconfirmation Date- set a day in the past that a parent should have reconfirmed their information by. This setting will force parents to confirm their detail is correct the next time the parent logs into the parent portal/connect portal.
- Reconfirmation Text- enter the text the parent should see when they will be updating/confirming detail is correct associated to the reconfirmation date.



Setup -> *System Config* -> Registration Config

Setup Registration Blacklist

Registration Configuration

Registration Version: Enhanced - Version 2

DCW Connect Registration Type: New Look and Feel - Catalog View

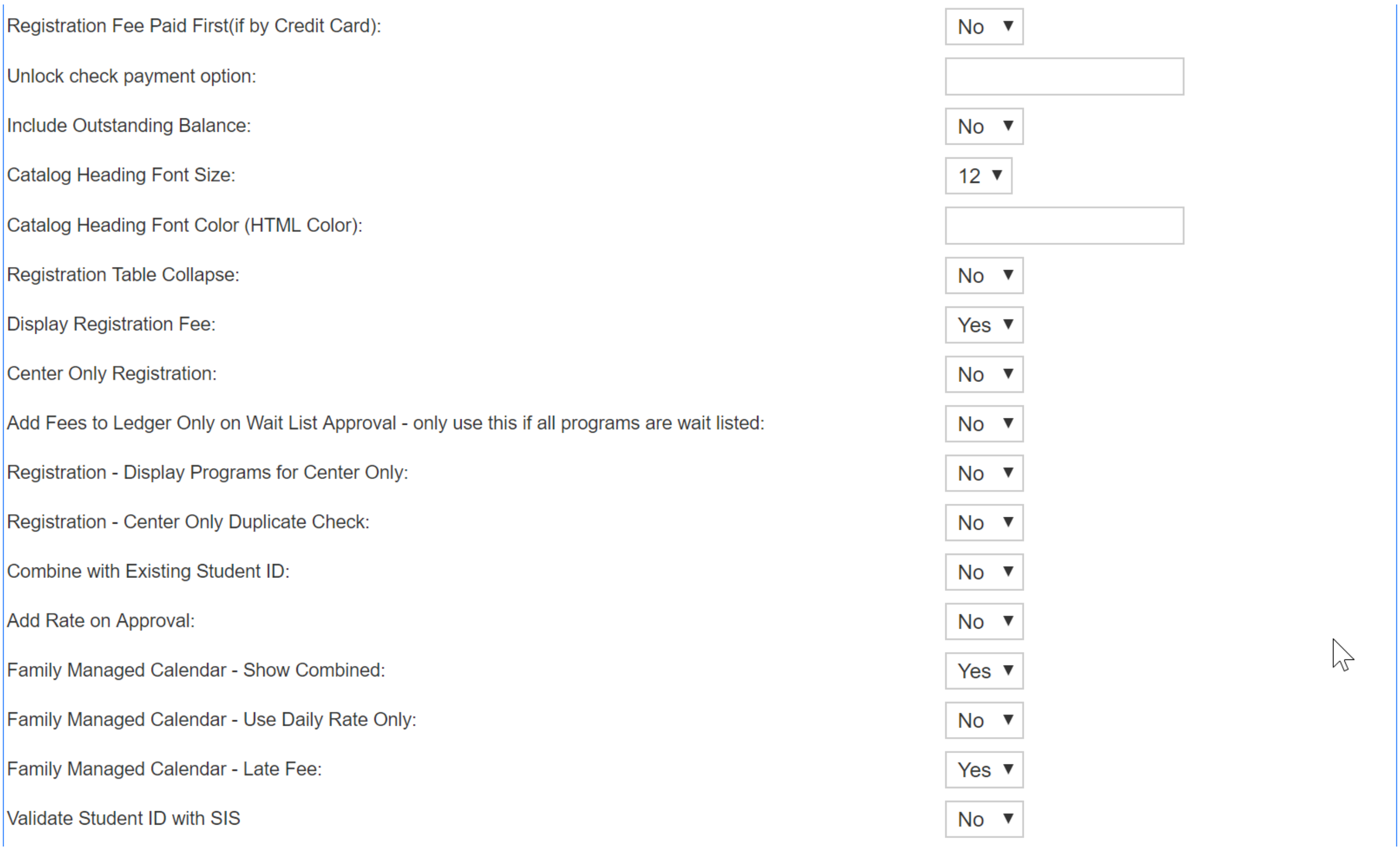
Reconfirmation Date:

Reconfirmation Text:

In the next section-

- Registration Fee Paid First (if by Credit Card)- will require parents to pay their registration fee before registration is completed.
- Unlock check payment option- enter a phrase in this field if you would like to allow parents the option to not pay by credit card during registration. The phrase in this field would need to be entered by a parent before trying to complete registration. If this phrase is used the balance in a parent's cart when registration is submitted will display on the family's financial ledger once approved.
- Include Outstanding Balance- Select YES if a parent's outstanding balance (credit or debit) should be included in the parent's total when completing registration- this will force a parent to pay an outstanding balance prior to signing up for another offering. If this field is set to NO the parent will just pay the balance associated with the programs currently in their cart.
- Catalog Heading Font Size- legacy registration option
- Catalog Heading Font Color (HTML Color)- legacy registration option
- Registration Table Collapse- legacy registration option

- Display Registration Fee- legacy registration option
- Center Only Registration-
- Add Fees to Ledger Only on Wait List Approval - only use this if all programs are waitlisted
- Registration - Display Programs for Center Only
- Registration - Center Only Duplicate Check
- Combine with Existing Student ID
- Add Rate on Approval
- Family Managed Calendar - Show Combined
- Family Managed Calendar - Use Daily Rate Only
- Family Managed Calendar - Late Fee
- Validate Student ID with SIS

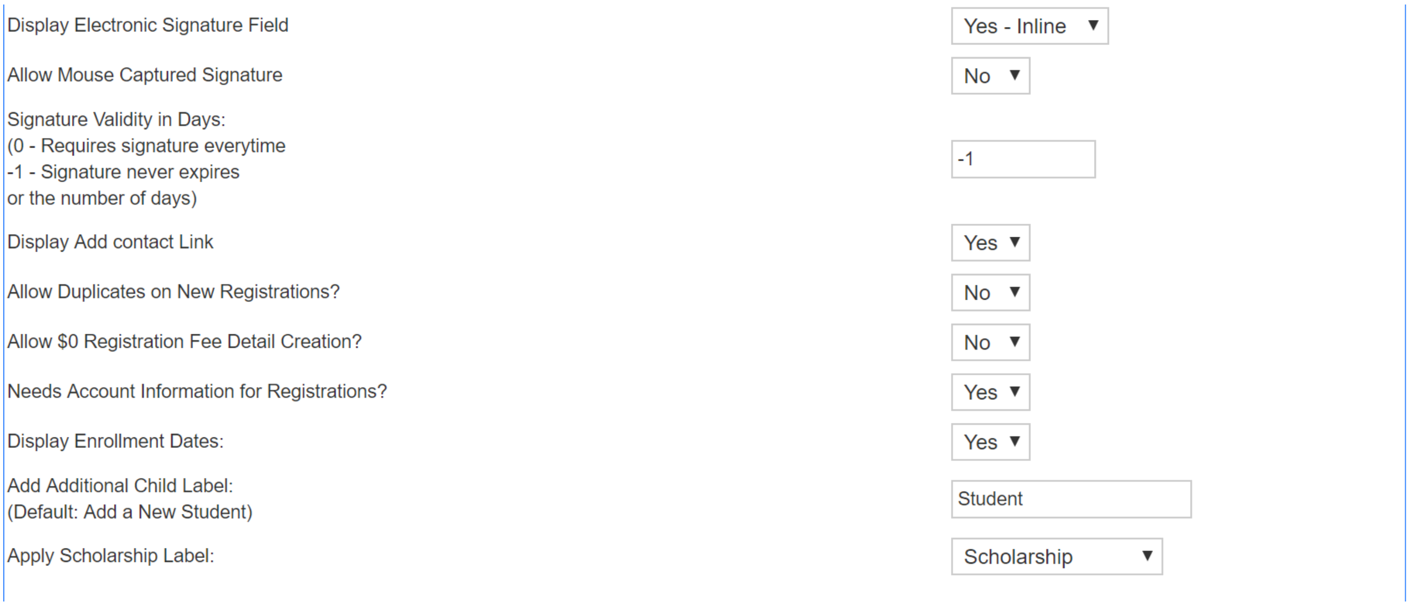


Registration Fee Paid First(if by Credit Card):	No
Unlock check payment option:	
Include Outstanding Balance:	No
Catalog Heading Font Size:	12
Catalog Heading Font Color (HTML Color):	
Registration Table Collapse:	No
Display Registration Fee:	Yes
Center Only Registration:	No
Add Fees to Ledger Only on Wait List Approval - only use this if all programs are wait listed:	No
Registration - Display Programs for Center Only:	No
Registration - Center Only Duplicate Check:	No
Combine with Existing Student ID:	No
Add Rate on Approval:	No
Family Managed Calendar - Show Combined:	Yes
Family Managed Calendar - Use Daily Rate Only:	No
Family Managed Calendar - Late Fee:	Yes
Validate Student ID with SIS	No

In the next section-

- Display Electronic Signature Field- there are two different ways to collect this signature, In-Line and Pop-up. Changes made to this setting will apply to all registration pages.

- Allow Mouse Captured Signature- this option will allow for the capture of a mouse signature. If used with a touch screen, users can use a stylus or their finger to sign. If used with non-touch screen, users can use their mouse to sign.
- Signature Validity in Days: (0 - Requires signature everytime, -1 - Signature never expires or the number of days)
- Display Add contact Link
- Allow Duplicates on New Registrations?
- Allow $0 Registration Fee Detail Creation?
- Needs Account Information for Registrations?
- Display Enrollment Dates:
- Add Additional Child Label: (Default: Add a New Student)- detail placed here will overwrite the child label in the registration area.
- Apply Scholarship Label- allows users to select what to call a scholarship- scholarship or promotional code.



Display Electronic Signature Field	Yes - Inline ▼
Allow Mouse Captured Signature	No ▼
Signature Validity in Days: (0 - Requires signature everytime -1 - Signature never expires or the number of days)	-1
Display Add contact Link	Yes ▼
Allow Duplicates on New Registrations?	No ▼
Allow $0 Registration Fee Detail Creation?	No ▼
Needs Account Information for Registrations?	Yes ▼
Display Enrollment Dates:	Yes ▼
Add Additional Child Label: (Default: Add a New Student)	Student
Apply Scholarship Label:	Scholarship ▼

The next fields allow users to customize the registration look of the new registration and connect portal pages.

- Start Page Text: enter text and images parents should see when they first arrive at a registration page, you may want to include general contact information, pricing etc.
- Finishing Page Text: enter the information that will be displayed on the last page of registration

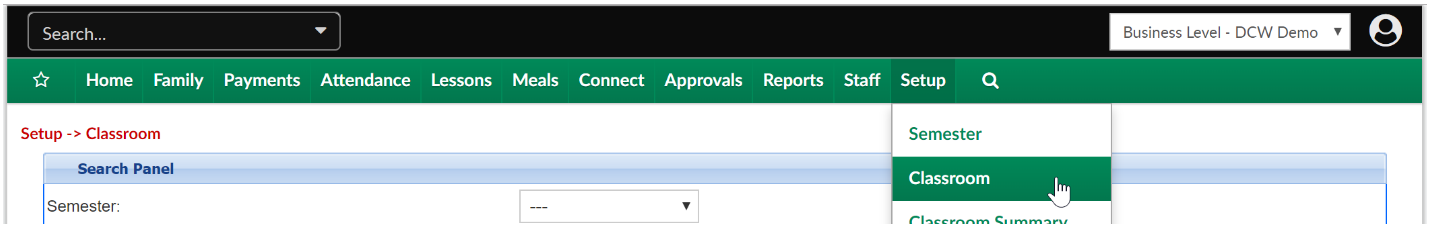
- Refund Policy: enter the refund policy in the Refund Policy text box. This will be displayed on the final page of registration for parents.
- Check Unlock Code Text: This text will appear if the Unlock Check Payment Option is entered and Pay First indicator is set to "Yes".
- Classroom Unlock Text: This text will appear if the unlock code is entered for the Classroom Semester.
- Capture Credit Card Text: enter the text that will appear after the online registration is captured by a credit card payment (this will mean the system will save a parent's credit card number once the parent has submitted their registration)
- Connect Portal Description: This will appear at the top of the Connect Portal Account Creation section on the registration checkout screen.
- Payment Information Description: This will appear at the top of the Payment Information section on the registration checkout screen.

Setup > Room, Category- Registration Setup

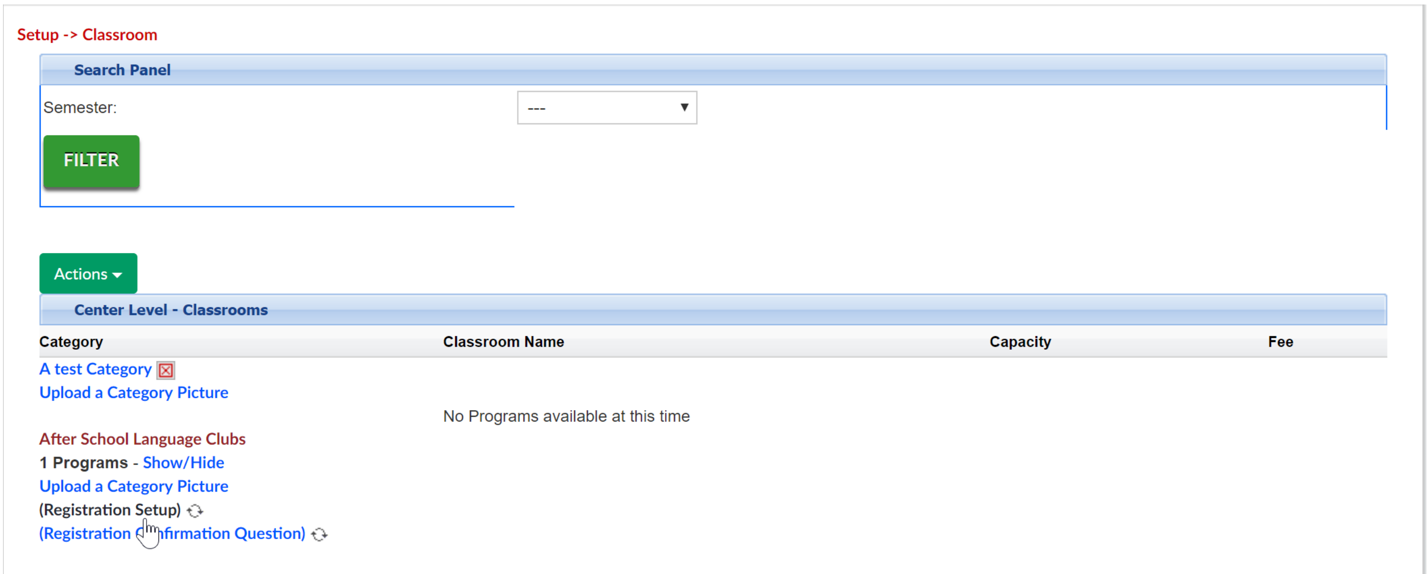
Last Modified on 03/08/2018 12:30 pm EST

The registration setup area allows users to set questions will that be displayed, hidden or required on registration forms. This setup can be created at the category level or the room/program level. Once registration setup has been completed at the Room/Program level the system will NEVER look at the category settings again for registration requirements.

Go to Setup, then select Room/Program/Classroom-



Then select Registration Setup under the category name-

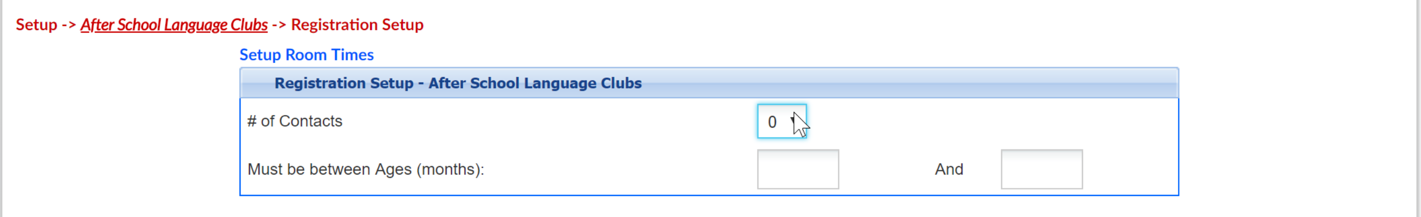


Semester: ---

Category	Classroom Name	Capacity	Fee
A test Category ☒ Upload a Category Picture	No Programs available at this time		
After School Language Clubs 1 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			

On the Registration Setup page select the number of contacts that should be required for registration into the program.

Then enter the age raneg in months for the children that are able to register for the program, the age in months relates to the child's CURRENT age, not the age they have to be when the room/program begins-



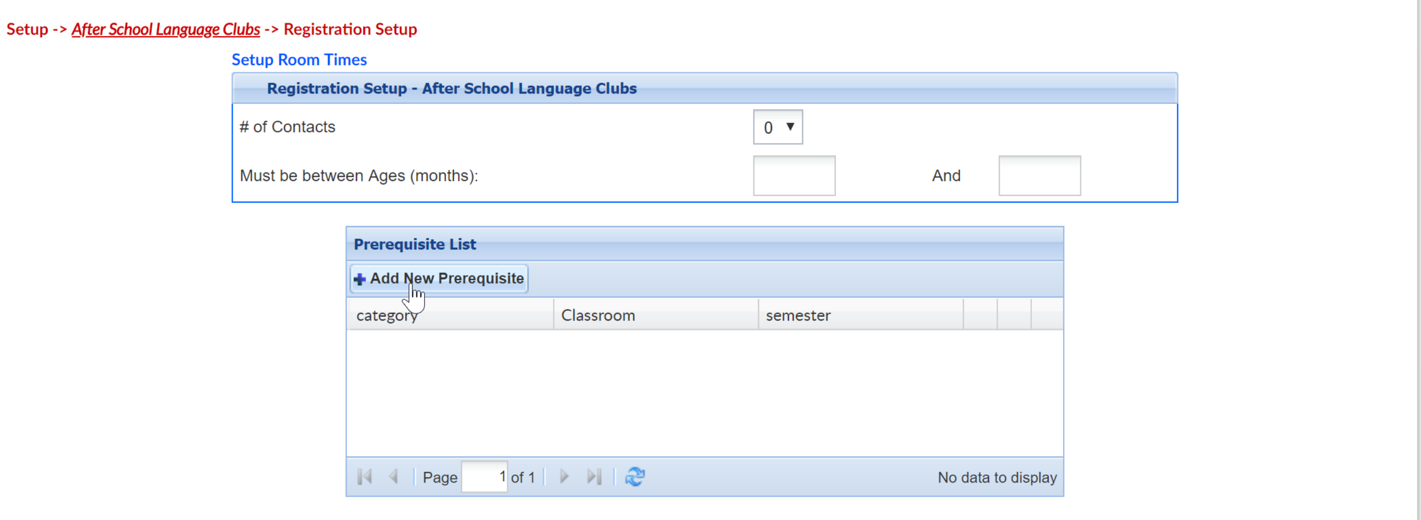
Setup -> *After School Language Clubs* -> Registration Setup

Setup Room Times

Registration Setup - After School Language Clubs

# of Contacts	0		
Must be between Ages (months):		And	

If Prerequisities exisit for the program select Add New Prerequisite-



Setup -> *After School Language Clubs* -> Registration Setup

Setup Room Times

Registration Setup - After School Language Clubs

# of Contacts	0		
Must be between Ages (months):		And	

Prerequisite List

category	Classroom	semester

Page 1 of 1

No data to display

For each options under the Field Requirements on the setup screen select Display, Hide or Require.

As soon as the settings on this page are saved the registration requirements will be updated.

Available fields are listed below-

Field	Type
First Name	Contact Fields
Last Name	Contact Fields
Address	Contact Fields
Address 2	Contact Fields
City	Contact Fields
State	Contact Fields
Zip	Contact Fields
Home Phone	Contact Fields
Work Phone	Contact Fields
Cell Phone	Contact Fields

Email	Contact Fields
Relationship	Contact Fields
Birth Certificate - Doc	Documents and Sponsors
Custody Papers - Doc	Documents and Sponsors
Immunizations - Doc	Documents and Sponsors
IEP - Doc	Documents and Sponsors
IEP Indicator	Documents and Sponsors
Sponsor Indicator	Documents and Sponsors
Discount Selection	Documents and Sponsors
Sibling Name (If Sibling Discount)	Documents and Sponsors
Court Restriction Indicator	Documents and Sponsors
Court Order Date	Documents and Sponsors
Additional	Documents and Sponsors
Resides With	Documents and Sponsors
Previous Summer Program	Documents and Sponsors
Previous School Program	Documents and Sponsors
Previous Preschool	Documents and

Program	Sponsors
Previous Pre-screening	Documents and Sponsors
School Attending Kindergarten	Documents and Sponsors
In District	Documents and Sponsors
Open Enrollment Completed?	Documents and Sponsors
Photo Release	Documents and Sponsors
Booster Seat	Documents and Sponsors
Photo Release Program Only	Documents and Sponsors
Sunscreen (Parent Provided)	Documents and Sponsors
Sunscreen (self apply)	Documents and Sponsors
Additional T-Shirt	Documents and Sponsors
T-Shirt Size	Documents and Sponsors
Swim Level	Documents and Sponsors
Swim Concerns	Documents and Sponsors
Open Swim	Documents and Sponsors
Insect Repellent	Documents and Sponsors

School Year Arrival/Departure	Documents and Sponsors
Summer School Arrival/Departure	Documents and Sponsors
Before School	Documents and Sponsors
Fall School Departure	Documents and Sponsors
Pickup Notes	Documents and Sponsors
Height	Documents and Sponsors
Weight	Documents and Sponsors
Hair Color	Documents and Sponsors
Eye Color	Documents and Sponsors
Sleep Position	Documents and Sponsors
After School	Documents and Sponsors
Food/Milk Allergy	Health
Special Food Needs	Health
Environmental Allergy	Health
Medication Allergy	Health
Epi Pen	Health
Other Allergy	Health
Asthma	Health
Inhaler	Health
Cerebral palsy/motor	

disorder	Health
Cognitive/learning disabilities	Health
Epilepsy/Seizures	Health
Chicken Pox	Health
Glasses	Health
Cold Count	Health
Colds	Health
ADD/ADHD	Health
Behavioral Issues	Health
Other Conditions	Health
Medications	Health
Participation Restrictions	Health
Symptoms	Health
Special Problems/Fears	Health
Additional Support	Health
Call Parents	Health
Immunization Exemption	Health
Special Instructions	Health
Personal Conviction Exemption	Health
Religious Exemption	Health
Motor Skills Detail	Health
Seizure Date	Health
Cognitive Info	Health
Participation Restriction Indicator	Health
Medication Info	

Indicator	Health
Other Medication Indicator	Health
Other Medication Info	Health
Reassessment and Triggers	Health
Medication Side Effects Info	Health
Trigger Details	Health
Hep B - Hepatitis B	Health
DT - Diphtheria, Tetanus (pediatric)	Health
Tdap - Tetanus, Diphtheria, Pertussis	Health
Hib - Haemophilus influenzae type b	Health
Td - Tetanus, Diphtheria	Health
IPV/OPV - Polio	Health
PCV - Pneumococcal Conjugate	Health
MMR - Measles, Mumps, Rubella	Health
Varicella - Chickenpox	Health
HPV - Human Papillomavirus	Health
Rota - Rotavirus	Health
Hep A - Hepatitis A	Health
MCV4/MPSV4 - Meningococcal	Health
Flu - Influenza	Health

Mumps	Health
DTP - Diphtheria, Tetanus, Pertussis	Health
Rubella	Health
Polio	Health
Diabetes	Health
Autism	Health
Accommodations	Health
DTaP - Diphtheria, Tetanus, Pertussis (pediatric)	Health
First Name	Parent/Guardian Fields
Last Name	Parent/Guardian Fields
Address	Parent/Guardian Fields
Address 2	Parent/Guardian Fields
City	Parent/Guardian Fields
State	Parent/Guardian Fields
Zip	Parent/Guardian Fields
Home Phone	Parent/Guardian Fields
Work Phone	Parent/Guardian Fields
Cell Phone	Parent/Guardian Fields
Pager	Parent/Guardian Fields
Birthday	Parent/Guardian Fields
Email Address	Parent/Guardian Fields
Best Address	Parent/Guardian Fields
Best Phone	Parent/Guardian Fields
Driver's License #	Parent/Guardian Fields
Electronic Signature	Parent/Guardian Fields
Driver's License State	Parent/Guardian Fields
Primary License Plate	Parent/Guardian Fields
Preferred Statement	

Delivery Method	Parent/Guardian Fields
Employer Information	Parent/Guardian Fields
Employer Name	Parent/Guardian Fields
Employee ID	Parent/Guardian Fields
Employee Work Location	Parent/Guardian Fields
Relationship	Parent/Guardian Fields
Last Name	Student/Child Fields
First Name	Student/Child Fields
Birthday	Student/Child Fields
Middle Name	Student/Child Fields
Sex	Student/Child Fields
Address 2	Student/Child Fields
Address	Student/Child Fields
City	Student/Child Fields
State	Student/Child Fields
Home Phone	Student/Child Fields
Zip	Student/Child Fields
Email	Student/Child Fields
Grade	Student/Child Fields
School Attending	Student/Child Fields
Student ID	Student/Child Fields
Custody papers have been provided?	Student/Child Fields
Language Spoken	Student/Child Fields
Secondary Language?	Student/Child Fields
Interpreter Language	Student/Child Fields
Interpreter Needed?	Student/Child Fields
Insurance Company	Student/Child Fields
Insurance Covered?	Student/Child Fields

Insurance Policy Number?	Student/Child Fields
Hospital Address	Student/Child Fields
Hospital	Student/Child Fields
Hospital Phone	Student/Child Fields
Doctor's Address	Student/Child Fields
Doctor's Name	Student/Child Fields
Doctor's Phone	Student/Child Fields
Dentist's Address	Student/Child Fields
Dentist's Name	Student/Child Fields
Dentist's Practice	Student/Child Fields
Dentist's Phone	Student/Child Fields
In an Emergency Call First	Student/Child Fields
Telephone Authorization Code	Student/Child Fields
The following person(s) may not remove my child from the facility	Student/Child Fields
Is child allergic to food or other substances? (If so, name foods or substances to be avoided and procedure to follow if reaction occurs.)	Student/Child Fields
Is child usually susceptible to infections and if so, what precautions need	

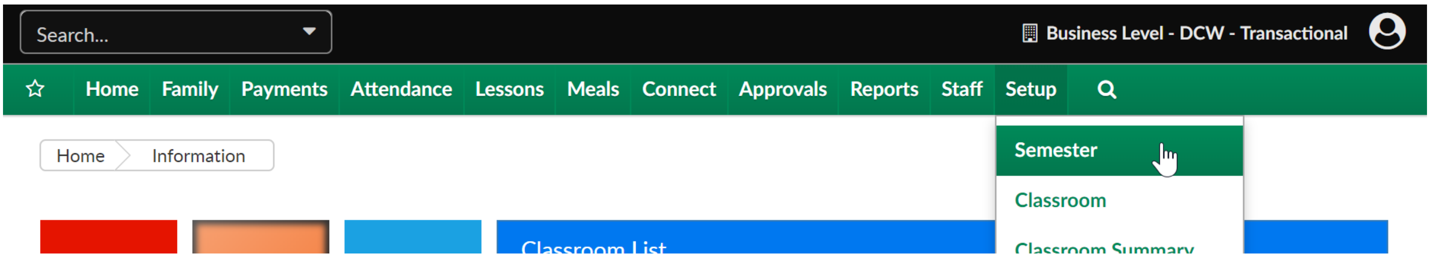
to be taken?	Student/Child Fields
Is child subject to convulsions and what should be our procedure if one occurs?	Student/Child Fields
Is there any physical condition that we should be aware of and what precautions should be taken (heart trouble, foot problem, hearing impairment, hernia, etc.)?	Student/Child Fields
Additional Comments	Student/Child Fields
Other special instructions	Student/Child Fields
Admission Date	Student/Child Fields

Room- How do I change a registration fee?

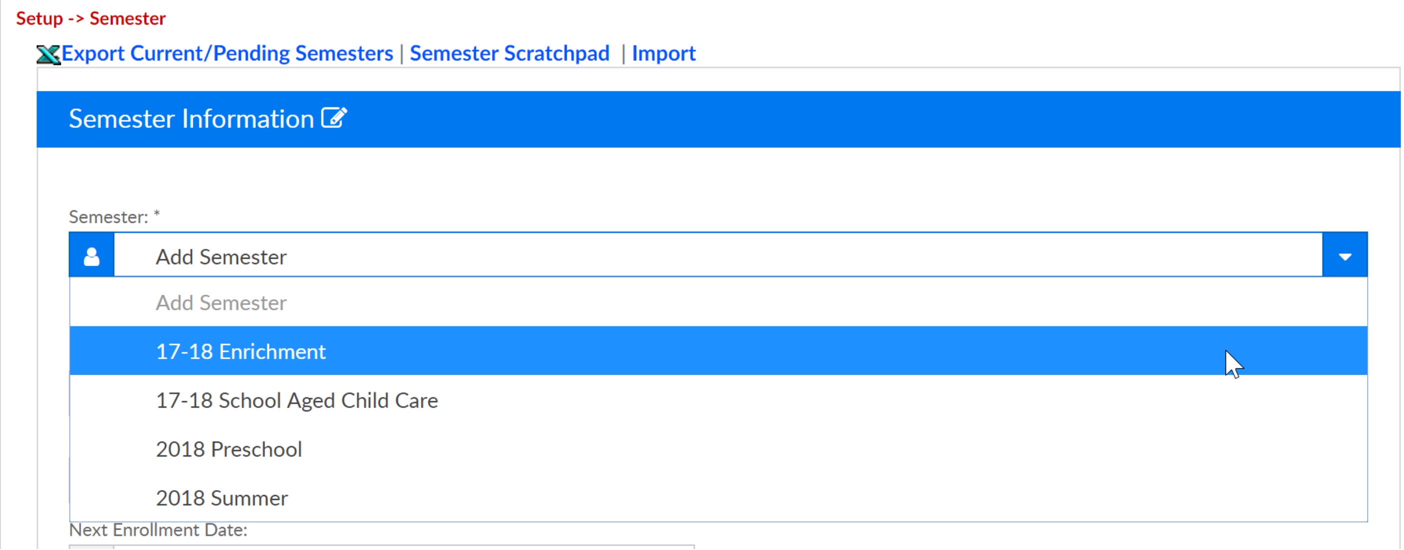
Last Modified on 04/13/2018 3:55 pm EDT

Registration fees can be added to the system in multiple areas, the first place to start when trying to adjust a registration fee is to see how the fee is being charged.

This can be seen on the Setup > Semester page.



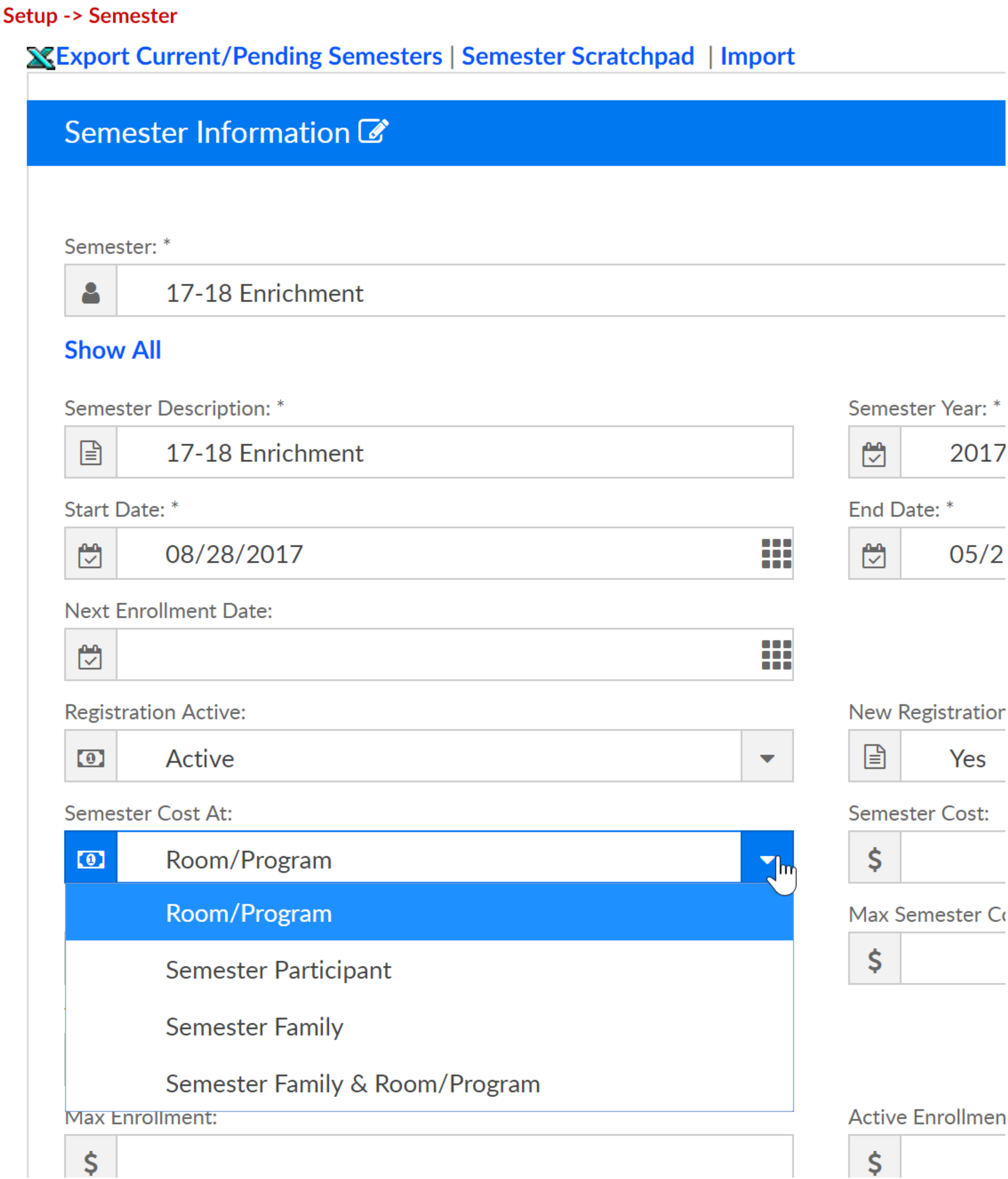
Select a semster from the drop down menu-



Then look at the Semester Cost At: field.

- Room/Program- registration fee is set at the room or room/semester level, this means that each room/program associated to the semester that has been selected will invoice as parents register for the program.
    - For example- AM, Before School has a registration fee AND PM, After School has a registration fee- if both rooms are selected the parent will pay a registration fee for both room/programs.
- Semester Family- registration fee is set by adding a total in the Semester Cost,

Semester Additional Participant Cost and Max Semester Cost fields on the Setup > Semester page
    - For example- If a parent has more than one child they will pay one fee for registration into one or more programs associted to the same semster.
- Semester Family & Room/Program- registration fee is set by adding a total in the Semester Cost, Semester Additional Participant Cost and Max Semester Cost fields on the Setup > Semester page AND the registration fee at the room or room/semester level
    - For example- AM, Before School has a registration fee AND PM, After School has a registration fee- if both rooms are selected the parent will pay a registration fee for both room/programs, the parent will ALSO pay an overall registration fee for enrolling in the semester.
    - Select Yes to tying semesters of the same date if using semester family and room/program and you do not want to charge the family for the same child if they enroll in additonal programs related to the semester.



Semester: * 17-18 Enrichment

Semester Description: * 17-18 Enrichment

Semester Year: * 2017

Start Date: * 08/28/2017

End Date: * 05/2

Next Enrollment Date:

Registration Active: Active

New Registratior Yes

Semester Cost At: Room/Program

Semester Cost: $

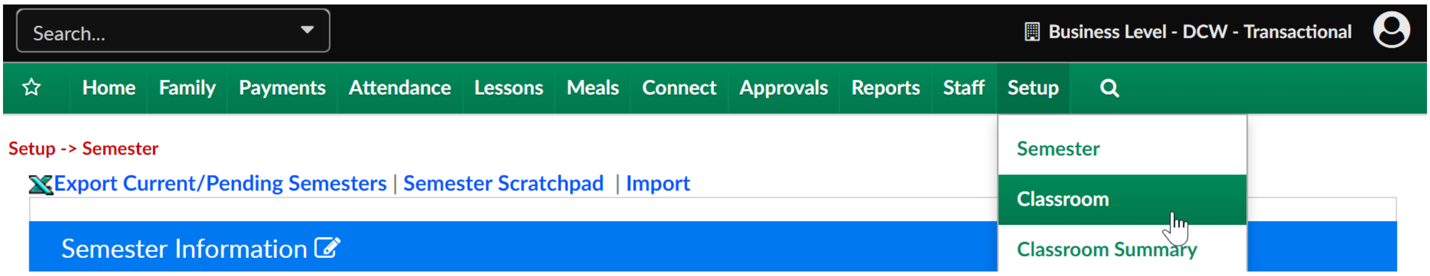
Max Semester Co $

Max Enrollment: $

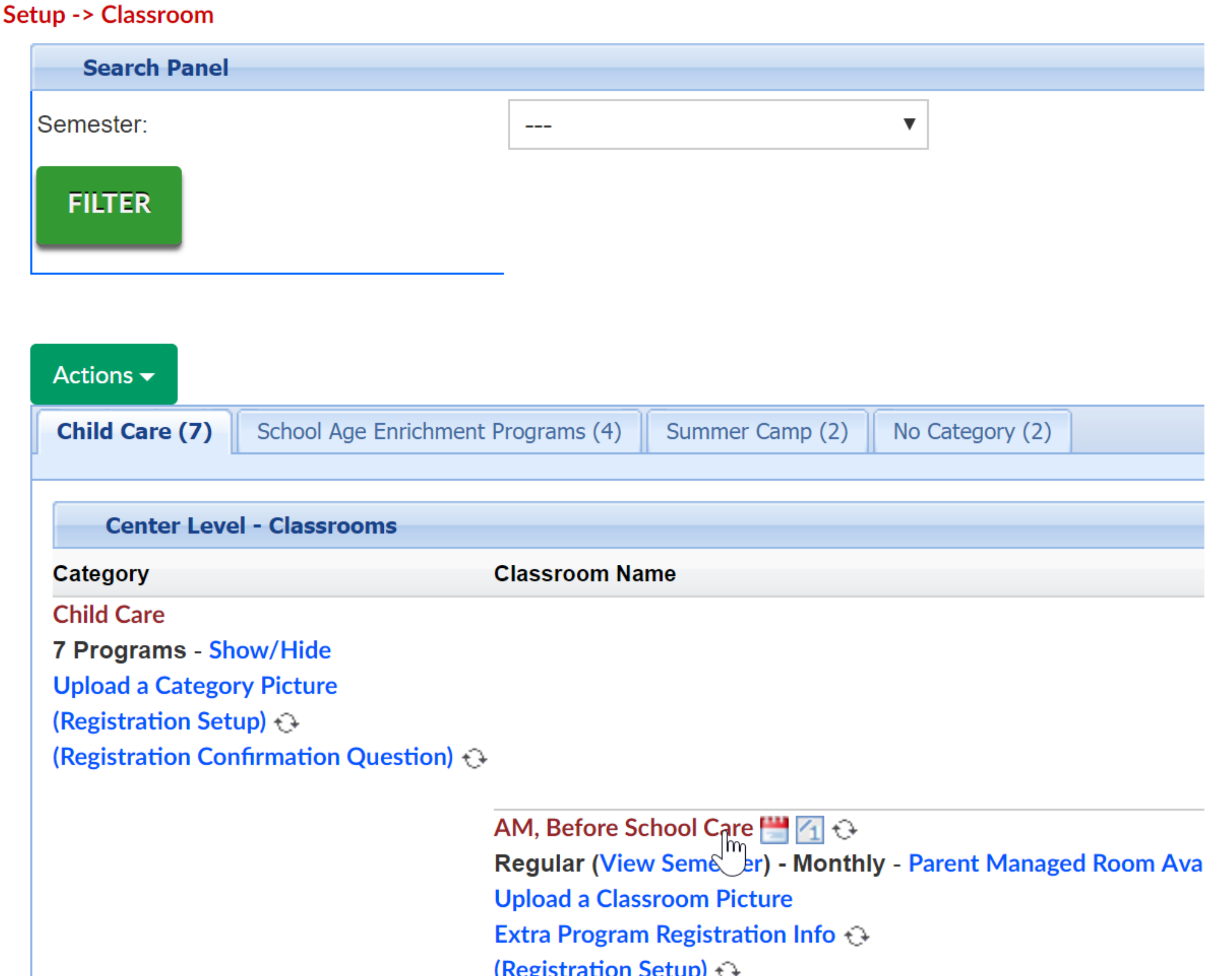
Active Enrollmen $

To update cost at the room/program level

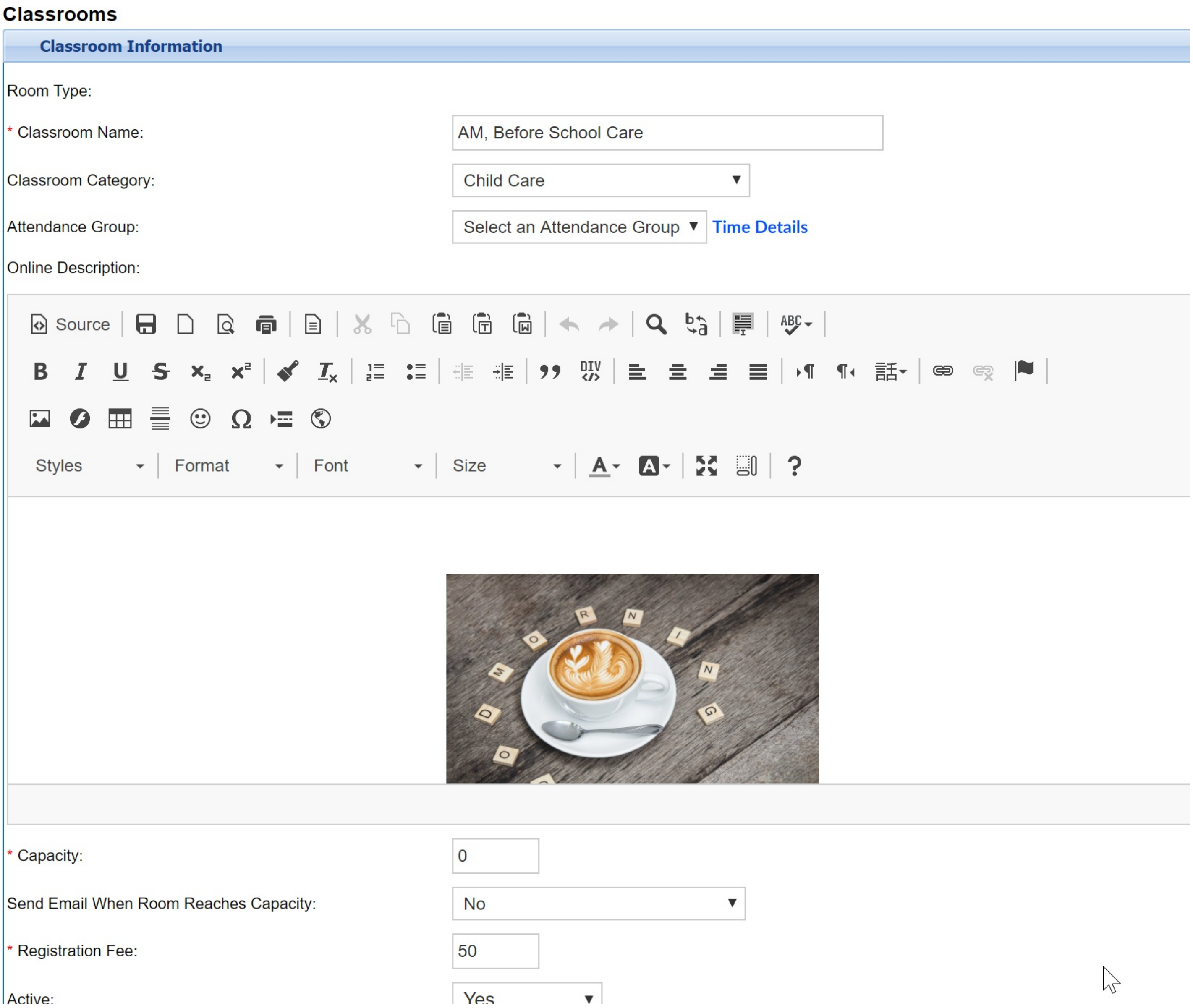
Go to the Setup > Room page-



On the Setup > Room page, select a room name



Enter the cost of the Room/Program into the Registration Fee field-



Classrooms

Classroom Information

Room Type:

* Classroom Name: AM, Before School Care

Classroom Category: Child Care

Attendance Group: Select an Attendance Group Time Details

Online Description:

* Capacity: 0

Send Email When Room Reaches Capacity: No

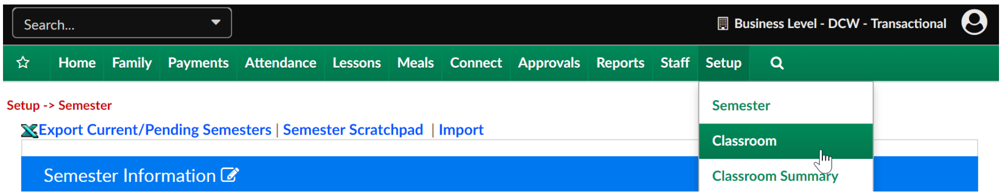
* Registration Fee: 50

Active: Yes

To update cost at the room/semester level

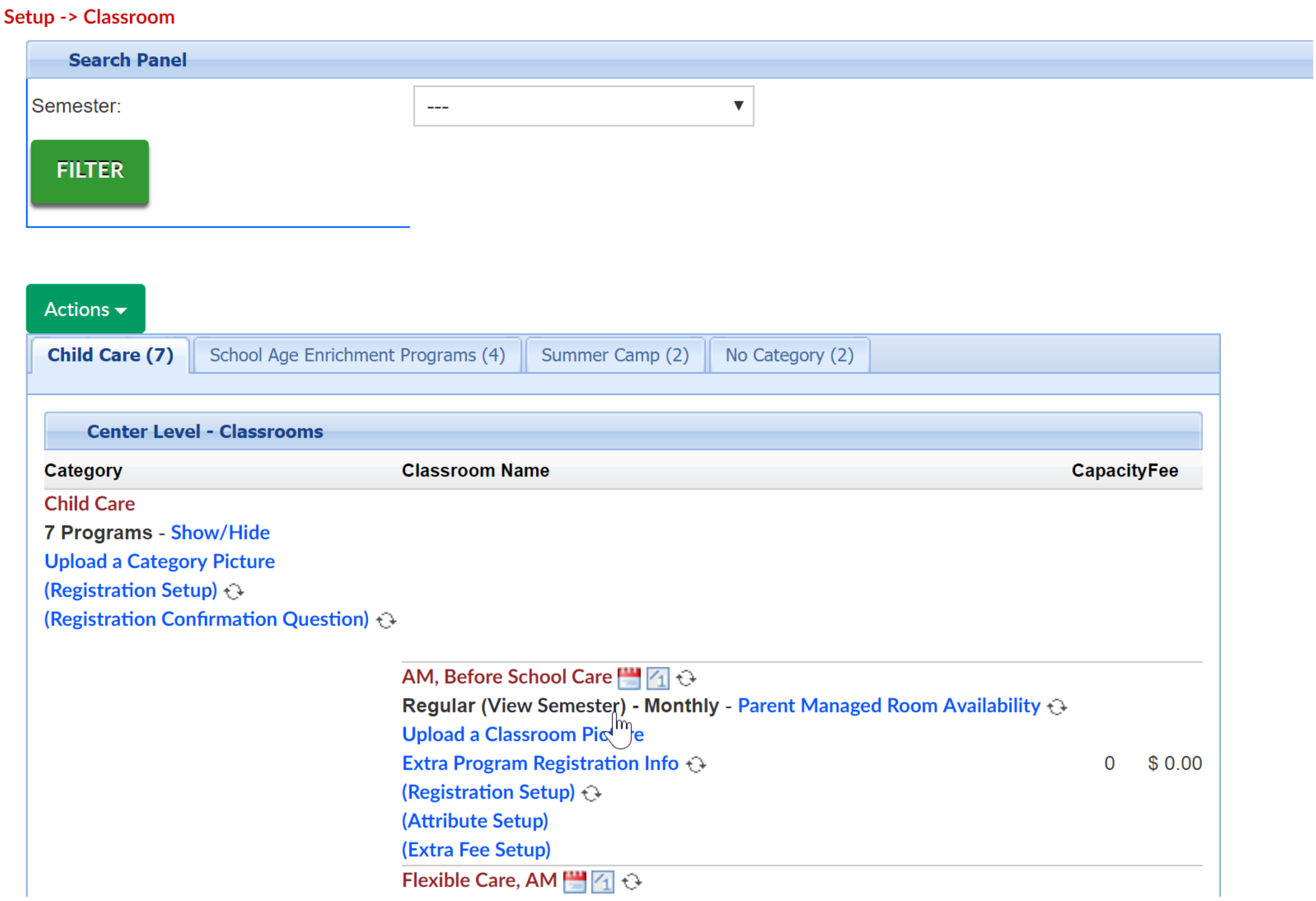
Note: if the registration fee is updated at this level the changes will apply to all sites the room/semester is assocated to. If sites have varient fees go to the setup > semester summary page to update by semester/room/site.

Go to the Setup > Room page-



Setup -> Semester

Then select the (View Semester) link under the Room/Program Name-


Setup -> Classroom

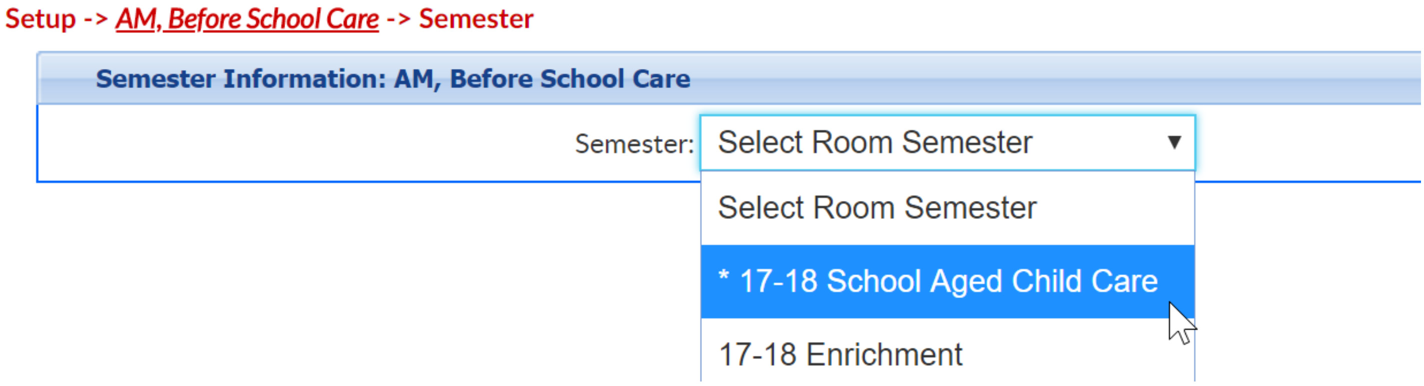
Search Panel

Semester: ---

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, AM		

Then select the semester from the drop down list-

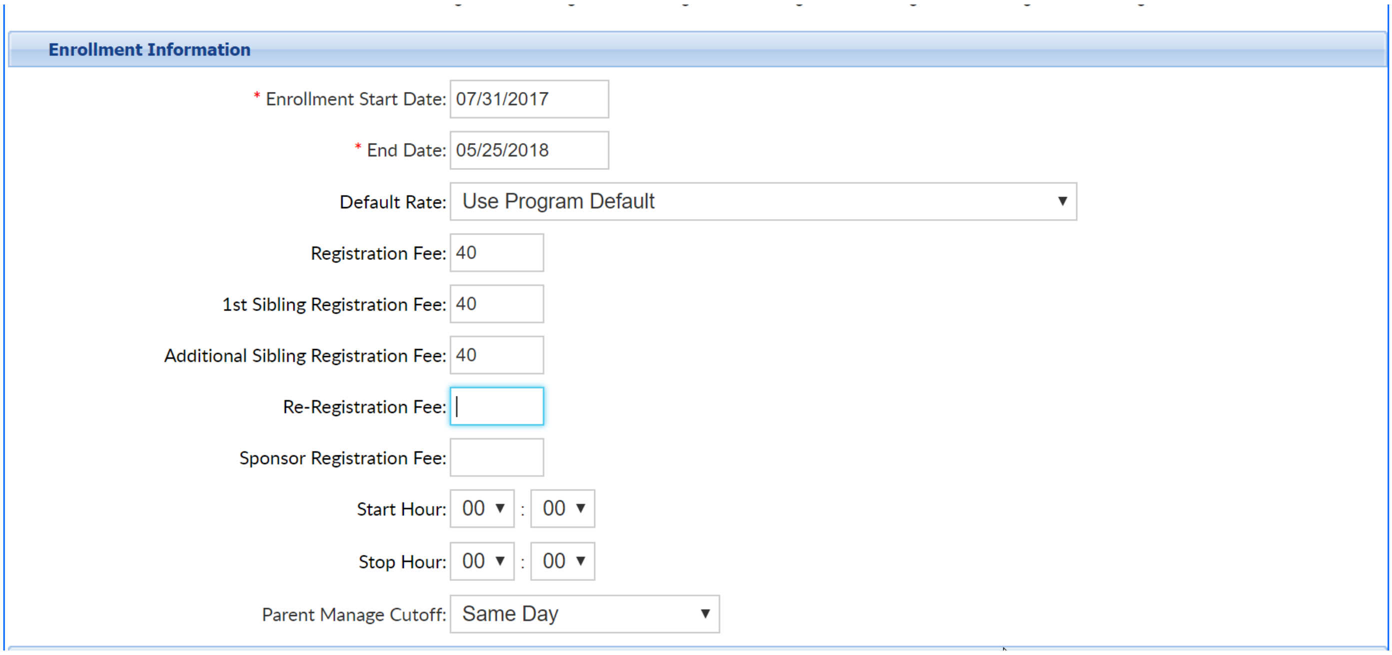

Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: Select Room Semester

Enter the registration fee amount in the Enrollment Information section-

- Registration Fee- cost of first child's registration fee
- 1st Sibling Registration Fee- cost of second child's registration fee
- Additional Registration Fee- cost of 3 + children's registration fees


Enrollment Information

* Enrollment Start Date: 07/31/2017

* End Date: 05/25/2018

Default Rate: Use Program Default

Registration Fee: 40

1st Sibling Registration Fee: 40

Additional Sibling Registration Fee: 40

Re-Registration Fee:

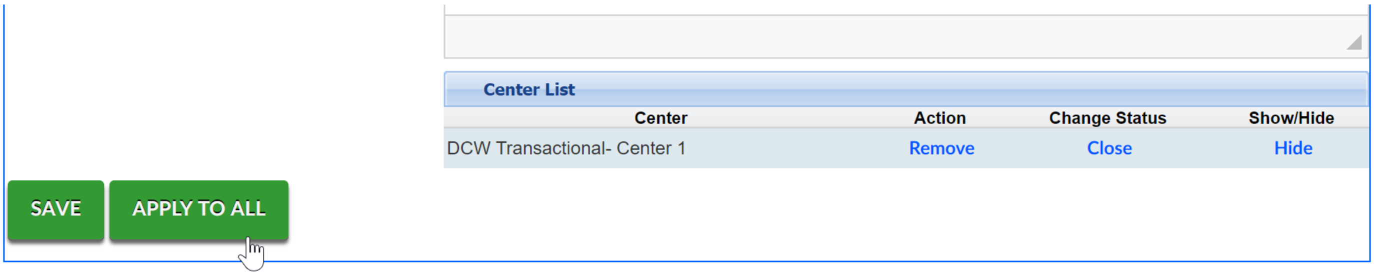
Sponsor Registration Fee:

Start Hour: 00 : 00

Stop Hour: 00 : 00

Parent Manage Cutoff: Same Day

Scroll to the bottom of the page and select Apply to All-


Center List

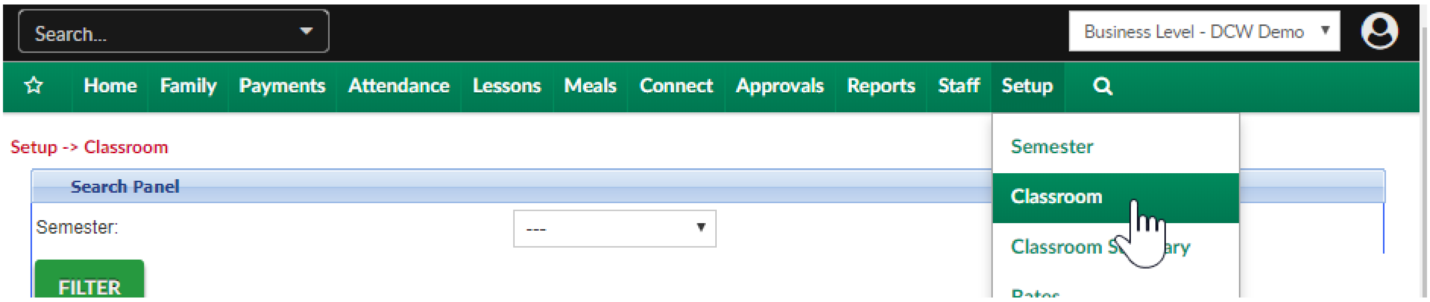
Center	Action	Change Status	Show/Hide
DCW Transactional- Center 1	Remove	Close	Hide

Registration- How do I require additional contacts?

Last Modified on 03/08/2018 12:30 pm EST

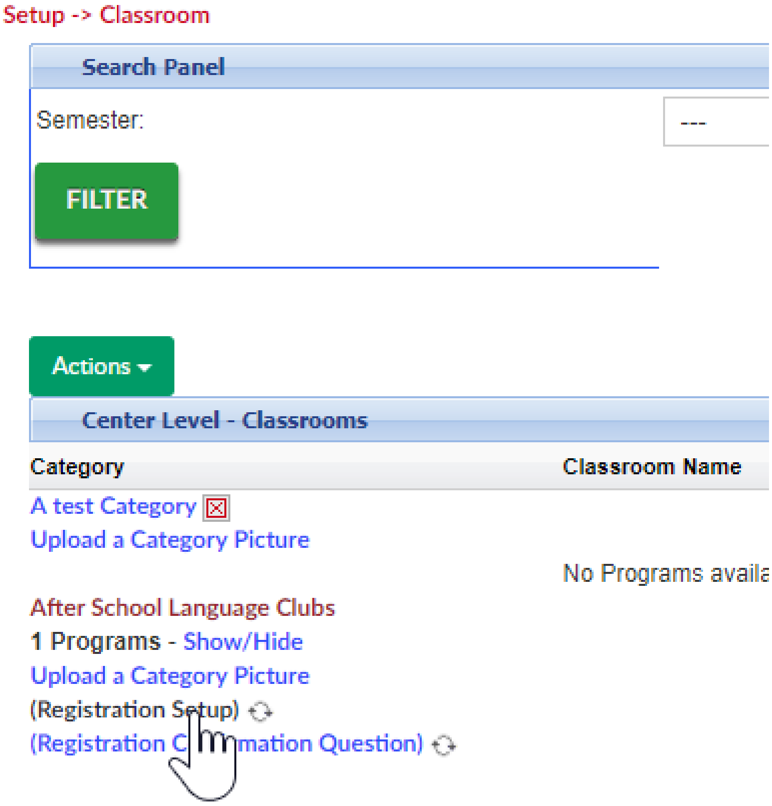
Registration questions asked and number of contacts required can be setup at the category or the room/program level.

To increase or decrease the number of contacts required during registration go to setup > room

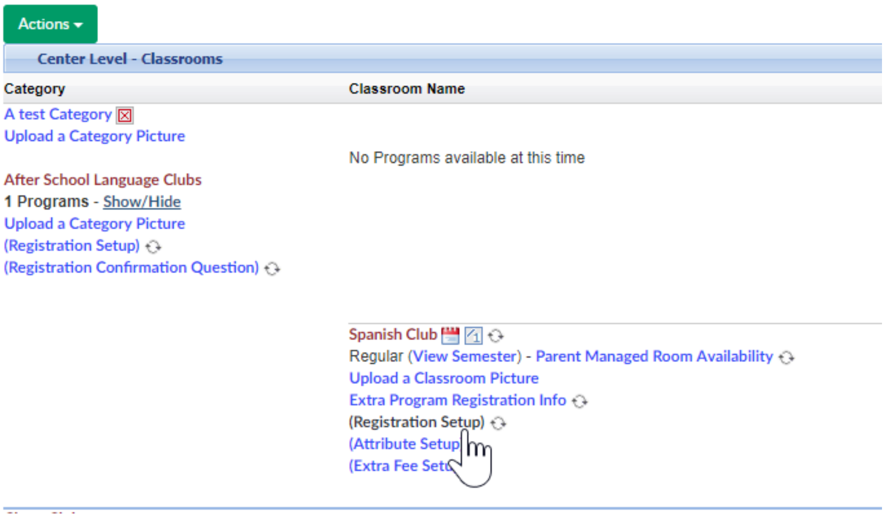


Select the registration setup option under the category or the room/program. Typically registration requirements will be set at the category level.

Category level selection-



Room level selection-



Actions

Center Level - Classrooms

Category

A test Category ☒
Upload a Category Picture

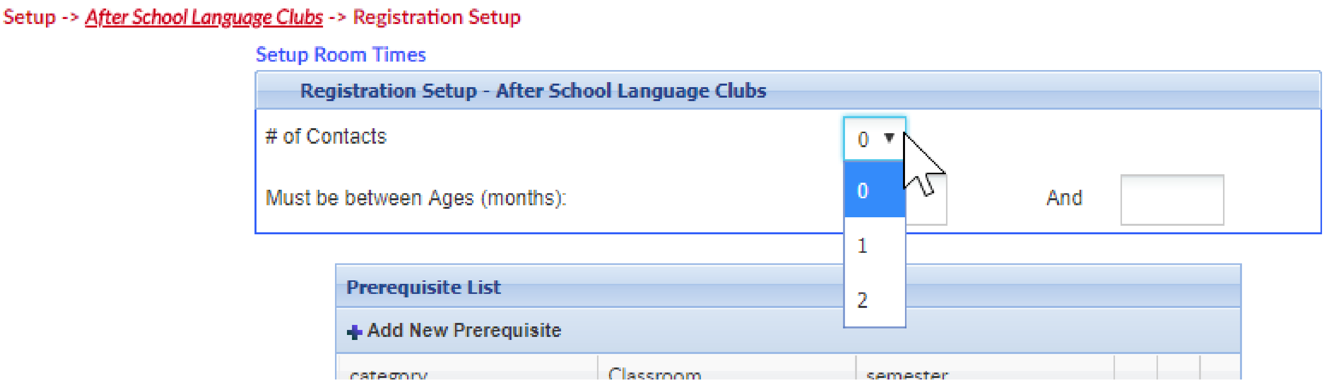
After School Language Clubs
1 Programs - Show/Hide
Upload a Category Picture
(Registration Setup)
(Registration Confirmation Question)

Classroom Name

No Programs available at this time

Spanish Club
Regular (View Semester) - Parent Managed Room Availability
Upload a Classroom Picture
Extra Program Registration Info
(Registration Setup)
(Attribute Setup
(Extra Fee Setu

Select the required number of contacts, then scroll to the bottom of the page and save.   If 1 is selected parents will have to enter contact detail for 1 emergency contact, if 2 is selected parents will have to enter detail for 2 emergency contacts- if 0 is selected 0 contacts will be required.



Setup -> After School Language Clubs -> Registration Setup

Setup Room Times

Registration Setup - After School Language Clubs

# of Contacts: 0

Must be between Ages (months): And

Prerequisite List

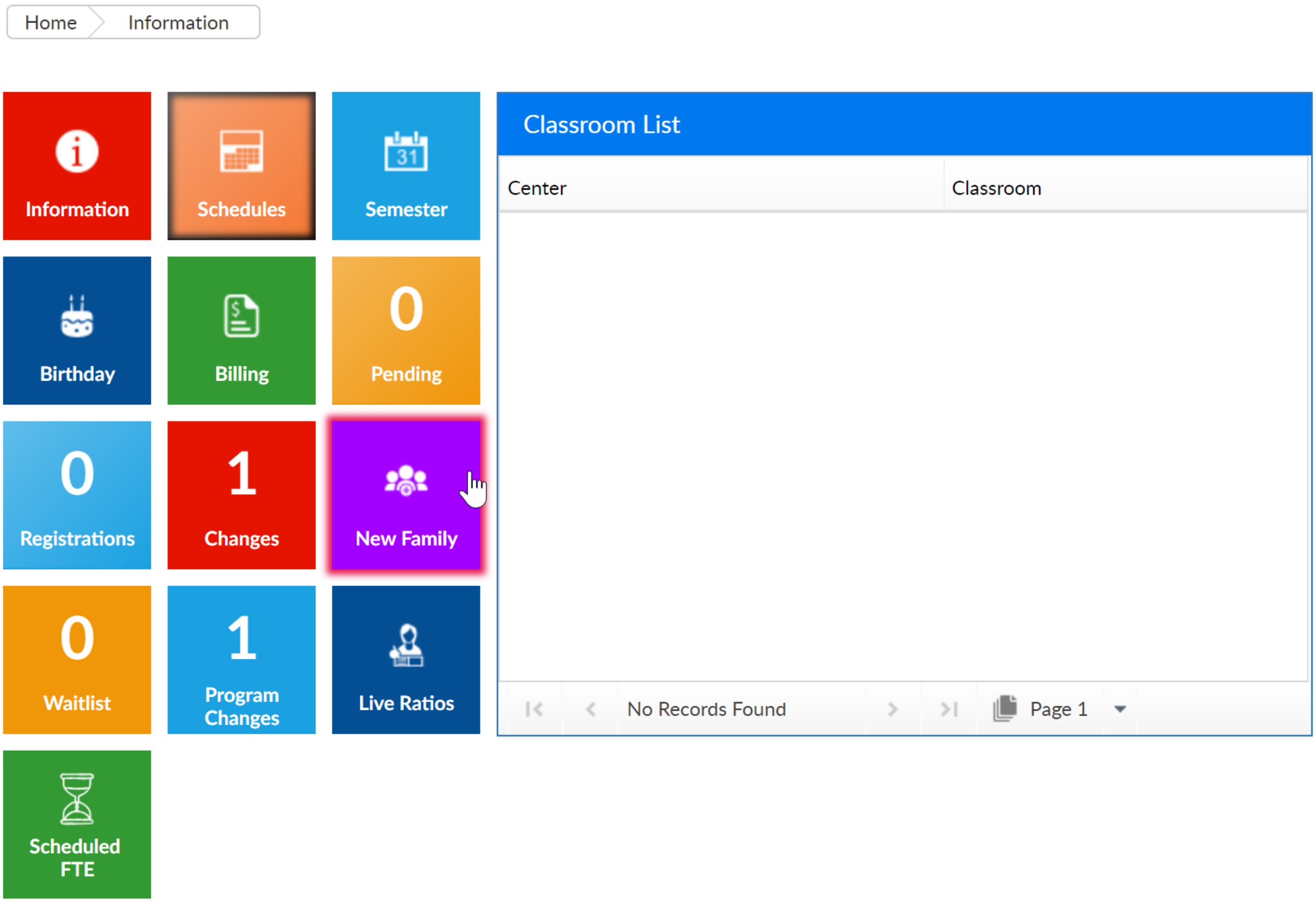
Add New Prerequisite

The max number of contacts that can be added from the new registration page is 2- if a parent would like to add additional contacts they would need to go to the personal page of the parent portal after their registration has been approved.

How to add a new family from the admin side.

Last Modified on 03/08/2018 1:29 pm EST

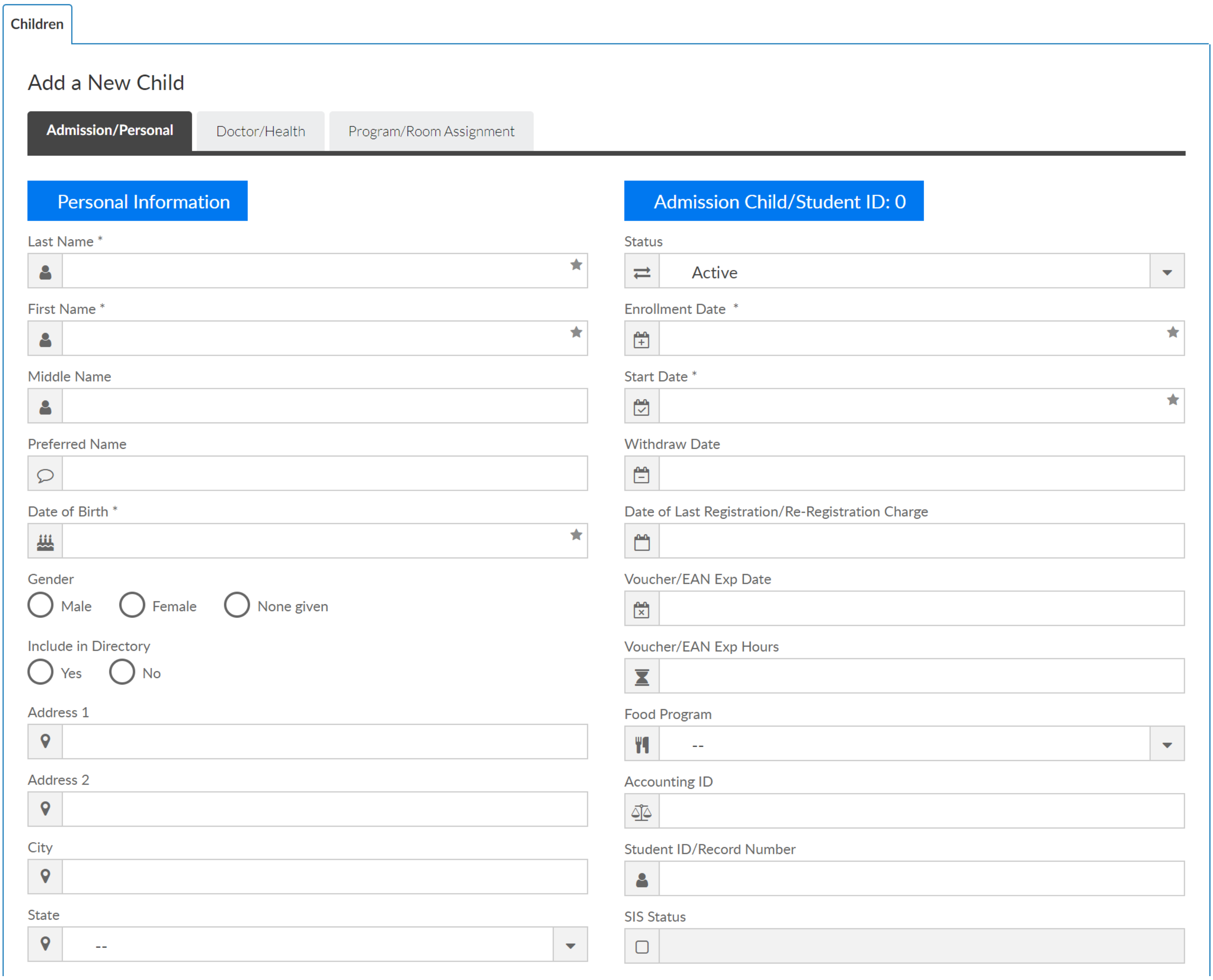
From the Home > Information screen select the New Family tile-



Enter Child detail into the Child screen, the only REQUIRED fields from the admin side are below, as a business you may decide that addtional fields are required-

- Last Name
- First Name
- Enrollment Date
- Start Date
- Birthdate

Once information has been added, selct Save on the Admission/Personal screen to continue the Add Family Process.



Children

Add a New Child

Admission/Personal | Doctor/Health | Program/Room Assignment

Personal Information

Last Name *

First Name *

Middle Name

Preferred Name

Date of Birth *

Gender

○ Male ○ Female ○ None given

Include in Directory

○ Yes ○ No

Address 1

Address 2

City

State: --

Admission Child/Student ID: 0

Status: Active

Enrollment Date *

Start Date *

Withdraw Date

Date of Last Registration/Re-Registration Charge

Voucher/EAN Exp Date

Voucher/EAN Exp Hours

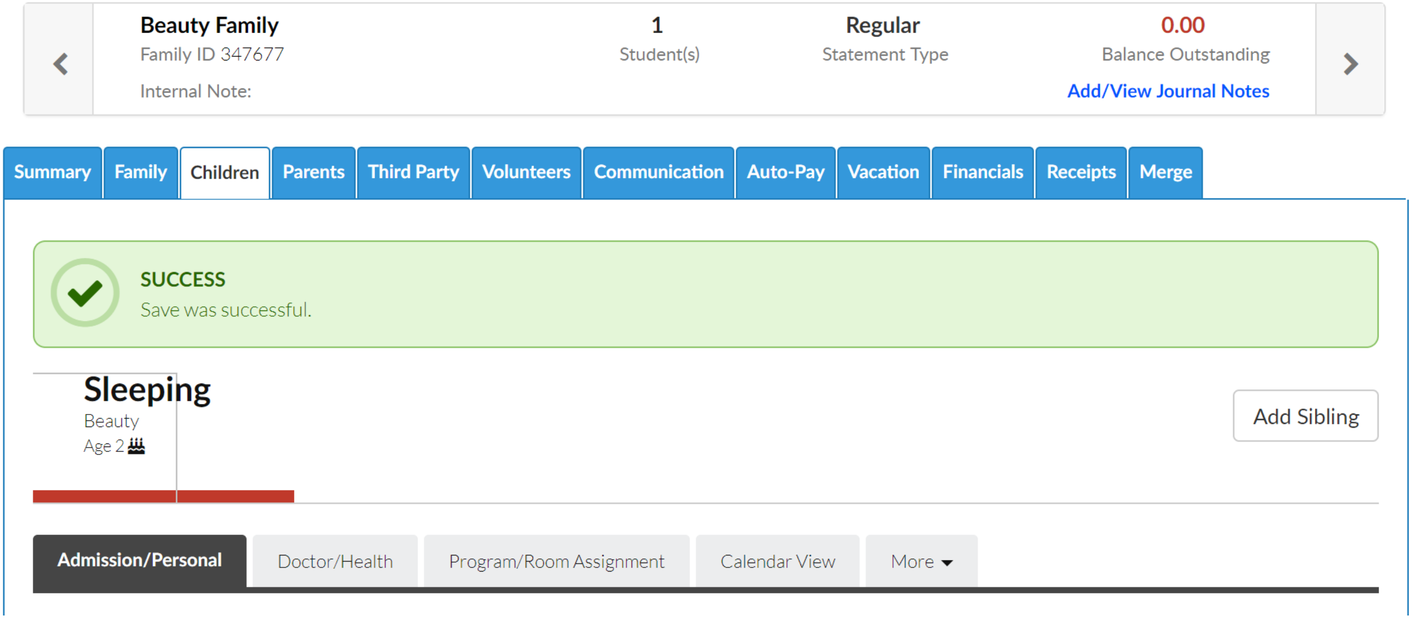
Food Program: --

Accounting ID

Student ID/Record Number

SIS Status ☐

Once the page has been save, you will see the expanded family record.



Beauty Family

Family ID 347677

Internal Note:

1 Student(s)

Regular Statement Type

0.00 Balance Outstanding

Add/View Journal Notes

Summary | Family | Children | Parents | Third Party | Volunteers | Communication | Auto-Pay | Vacation | Financials | Receipts | Merge

SUCCESS

Save was successful.

Sleeping

Beauty

Age 2

Add Sibling

Admission/Personal | Doctor/Health | Program/Room Assignment | Calendar View | More

Select the Doctor/Health tab to add basic health information.

Select the More menu, then the additonal information or health options to add detail.

Select the More menu, then select Contacts to add contact information for the child(ren).

After child information has been added, select the Parents tab and enter guardian 1 and guardian 2 detail.

- If your site is using the Connect/Parent portal be sure to add a username and password for each parent. You will need to provide this detail to the parents.

Kickoff Checklist

Last Modified on 12/11/2017 8:08 am EST

Welcome to Cirrus Group!

We are pleased you have selected our Platform for managing your business. We look forward to working together to ensure your implementation will be a success.

Below is some important information regarding the establishment and support of the application. Please familiarize yourself with this information and do not hesitate to call us with any questions.

System Configuration

Configuration will begin following the Kickoff Meeting. Configuration will include the importing and setup of core information such as rates, programs and rooms, categories, semesters, student, family and staff information. On a periodic basis we will have phone calls to review the progress of your configuration setup. Once configuration is complete you will validate and sign off on all entered information.

Applications

Web
Super User access – This is your designated contact(s) who will be granted full administrator rights to your site and will be responsible for managing your user accounts following the go-live date.
Depending on the Platform you have chosen, your administrators and designated staff members will log into the appropriate Platform via the “Provider” link on the top navigation area of www.DayCareWorks.com , www.SchoolCareworks.com or www.RecCareWorks.com

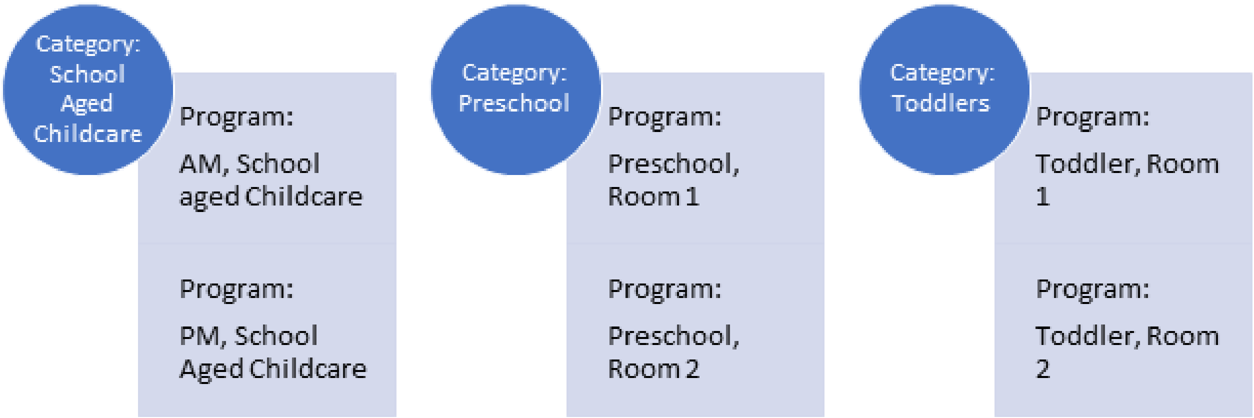
Tablet
If you will be utilizing any of our InSite tablet applications, please download the appropriate application from the iTunes Store, Google Play Store or Android Marketplace. We will instruct you on authorizing each device for your site during your training sessions.

- InSite Provider - Staff and Administrator Use
- InSite Select - Parent & Staff Check-In/Out

Kickoff Checklist

Please send the below information to your implementation contact.

- List of superusers/admins you would like to have initially added to the system, please include:
    - First and Last Name
    - Title
    - Phone Number
    - Email Address
- List of business level and site information
    - Name of site
    - Address
    - Phone Number
    - Site Contact Name
    - Site Contact Email Address (this address will receive registration confirmations for site)
- A copy of your logo in PNG or JPG format
- Room/Rate information- please send a copy of your rate sheet, a list of the programs you offer and any specific groups you would want to be able to take attendance for. In our system room, program, classrooms are the synonymous. Rooms represent a roster or grouping of children for attendance or reporting purposes.
    - Room/Programs are grouped into categories to help organize registration and reporting. This starts to create a hierarchy. The names of the categories and rooms are totally dependent on client setup, the general structure will remain the same.
    - Send dates of your semesters or times you will be offering programs, also include the dates you would want to begin registration for each type of program.
    - Also include any registration fees and rules that may surround the charging of the fee.



- Miscellaneous Billing Information- this will include detail regarding discounts, coupons, additional fess you may charge etc.
    - Discounts- include discount amounts, names, rules
    - Coupons- include examples with rules
    - Additional Fees- include amounts and rules, for example- late pickup, returned payment or late payment fees
- Third Party/Sponsor Information
    - Include names of third parties your schools receive reimbursement from
- Requested Reports- please send any reports you are currently using on a regular basis, we will try to find matches for the reports within the system and will confirm how to run the reports during setup/training.
- Registration Forms- send current registration forms
- Child Information Sheet- if you are currently using a generic child information sheet (other than the state form) for licensing purposes please send as well.
- Imports- basic data can be imported into the system (optional)
    - Child/Family import- allows for child, parent and contact information to be added to the system (this does not include room assignment)
    - Staff import- sets up basic staff information- name, address, phone number (additional details such as home site, username and password and pin will need to be assigned manually by an admin through the front end)
    - Balance Forwards- sum amount owed to/from a family added to each family's financial ledger
- Integrations (additional fees apply), please confirm which integrations you would like to setup

- Payroll- link to a payroll processor for staff time upload
- Financial- link to a financial system for upload
- Payment Processing- allows online credit card and ACH payments to be made through the admin side and parent portal
- SIS- allows for an upload from a student information system into our software- this usually means you can link SIS number and import child/parent information.

Post-Kickoff Activites

Last Modified on 05/23/2018 7:53 am EDT

For each business level and site level, go to the Home > General tab and view/update site and contact information.

- Home > General Overview
    - Site Name
    - Site Address
    - Site Phone Number
    - Contact Name
    - Contact Email
    - License Information

Add your Tax ID number, this will display on statements!

- General Config Settings
    - Go to setup > system config, then select General Config. The first field will be Tax ID. Add number, scroll to the bottom of the page and press Apply All

Start to think through user group and what activities you would need them to do within the system. Customized roles can be setup by going to setup > admins, then select Setup Roles.

- Setup Roles Overview

Confirm available training times and dates with implementation specialist! View our training checklist here to get started learning the system with self-exploration!

Training Checklist

Last Modified on 03/14/2018 9:43 am EDT

Training Checklist

Below are the topics that will be covered during setup and training. To get a head start begin walking through the linked pages and engage in some self-discovery.

Make sure to keep track of questions or issues you come across as you are exploring.

Training Type	Training Time (est)	Training Activities
System Overview & Basic Functions	*1-1.5 Hours*	• Adding families to the system ◦ Adding siblings ◦ Adding parent information ▪ Accessing the parent portal ◦ Adding contacts to children ◦ Setting up an initial program/room assignment • Basic Reporting ◦ Reports > Room/Program- student schedule summary- excel ◦ Reports > Room/Program - child attendance detail- excel ◦ Reports > Room/Program- Health/Allergy- Full List- PDF ◦ Reports > Room/Program- Health/Allergy Report for Center- PDF ◦ Reports > Room/Program- Weekly Roster Summary- PDF ◦ Reports > Room/Program- Weekly Schedule Roster- PDF

		◦ Reports > Room/Program- As PDF ◦ Reports > Room/Program- Weekly AM/PM Sign In- PDF ◦ Reports > Room/Program- Extended Registration Questions- Excel ◦ Reports > Room/Program- Extended Registration- Excel
Room, Semester & Rate Setup	*1-1.5 Hours*	• Setting up categories, rooms & semesters ◦ Semesters ◦ Categories ◦ Rooms ▪ Recurring Billing Rooms ▪ Events ◦ Semester-Room Associations ▪ Alternate Methods • Maintenance/Editing Options ◦ Cloning a classroom or event ◦ Cloning a semester • Rates ◦ Adding/Editing Rates ◦ Adding/Editing Discounts ◦ Adding Scholarship Codes
		• Settings up required questions • Setting up extra program questions • Setting up terms and conditions • Adding in extra verbiage ◦ Registration Start Text

Registration Setup & Approval	*30 minutes- 1 Hour*	■ At the business level ■ At the category level ○ Descriptions ■ At the business level ■ At the category level ■ At the room level ○ Finishing Text ■ At the business level ■ At the category level ■ At the room level • Approving Registrations • Registration Reporting ○ Reports > Room/Program- Extended Registration Questions- Excel ○ Reports > Room/Program- Extended Registration- Excel
Communications Setup	*30 minutes- 1 Hour*	• Setting up email ○ Server Options ○ System Templates ○ Custom Templates • Portal Communications ○ Creating and Editing Announcements ○ Sending Emails ○ Creating Calendar Events
		• Adding admins to the system ○ Updating admin passwords • Adding staff to the system ○ Setting up User IDs

Staff Setup & Scheduling	*30 minutes- 1 Hour*	◦ Setting up PIN numbers • Setting up Schedules • Editing Staff Security • Adding/Editing Staff Attendance • Staff Reporting ◦ Reports > Room/Program, Staff Hours ◦ Reports > Room/Program, Staff Data
Financial Review	*1-1.5 Hours*	• Billing Process ◦ Transactional billing ◦ Defined billing ◦ Sending out statements • Payment receipting ◦ In batch format ◦ By individual family ▪ Processing online payments ◦ Third-party payments ◦ Batch and reporting • Payment reporting- reports > financial ◦ Credit card reconciliation ◦ Payment reconciliation ◦ Charges and credits detail & summary
Role Setup & Application	*30 minutes- 1 Hour*	• Setting up admin roles ◦ Admin activities • Applying roles to admin/staff
InSite Applications		• InSite Provider- classroom management application used by staff/administration by location

*InSite Select *InSite Provider *InSite Connect	*30 minutes-1 Hour*	• InSite Select- check in/out application used by parents and staff to record time • InSite Connect- parent facing application

Support Links!

Last Modified on 06/29/2018 3:23 pm EDT

Web Conferencing

For configuration and training sessions the program Join.Me is used, this will allow the ability to share screens. Meeting invitations will be sent via email with a link to the web conference and a phone number for the conference line. Please follow this link for directions on how to start a Join.me meeting. (http://help.join.me/knowledgebase/articles/149473)

Help Documentation

Helpful documentation, including user guides and explanations of configuration options, can be found by visiting our online help documentation.

Care-Support Portal

If questions or issues arise during the implementation, training or live phases, customers should submit and monitor request tickets through our customer care web portal. Your login details will be your first and last name for both your username and password. Please change your password after logging in the first time. Follow this link to login. (http://care.cirrusgroup.com)

Telephone

Please call our phone number at (248) 841-1940, one of our support representatives will be glad to assist with any questions or issues. Our office is staffed M-F between the hours of 8:00 a.m. and 5:00 p.m. EST.

Notifications

Important alerts, including system status notifications, will be sent from Alerts@cirrusgroup.com. Please make sure to add the domain 'cirrusgroup.com' to your email system safe-sender lists so messaging is not blocked or delayed.

Setting Up a New Center

Last Modified on 10/13/2017 10:45 am EDT

How to add a new center to your business

1. You must be a **Superuser** in order to create a new center within your business
2. From the drown down menu in the top right corner select a center that you want to copy from to create your new site
3. Once at the center level go to **HOME > GENERAL**
4. Scroll to the bottom of the page and select the **CLONE** button
5. Enter the new name for your site in the popup box, then select **CLONE**
6. **Logout**
7. Log back in, and go to the new site by selecting the name of the center from the drop down list in the top right corner of the screen
8. Go to the **HOME > GENERAL** tab and update center detail and contact information press **SAVE** when complete
9. Add rooms to the center
    1. If rooms are setup at the business level, go back to the business level and go to **Setup > Rooms**
        1. If applicable authorize existing rooms to the new center by selecting the name of the room and scrolling to the bottom of the screen.
            1. Click **ADD** next to the new centers name
            2. Select the **SAVE** button, select the fields you want to copy from the business level to the center level- then press **SAVE** to complete
    2. If applicable create new categories and rooms (see help documentation if steps are needed)
        1. Adding a category
        2. Adding a room
            1. Recurring Billing
            2. Events
            3. Parent Managed
    3. If new categories have been added be sure you have configured the

        registration setup questions under the new category
        1. Registration Setup
        2. Registration Confirmation Questions
        3. Additional Questions at Room Level
10. Add rooms to a **Semester**
    1. How to attach rooms to a semester
    2. Alternate way to attach rooms to a semester
11. Add **rates** for the center
    1. If you are adding rates to the business level and you only want the rate to display at the new center, be sure you select the lock on the line of the rate to authorize to specific center(s).
12. Log a ticket to the Care Portal to request the new InSite ID and Passcode so you are able to use the InSite Select and Provider Applications.

Helpful Reminders

- Be sure credit card processing has been added to the center
    - Check with your processor if unsure of the API Key and Password
    - If additional detail needs to be added please add a ticket to the Care portal so that processing can be configured
- Once the new center has been setup test the registration process (if applicable)
    - New registrations- brand new families
    - Existing parent registration- returning families

Go-Live User Checklist

Last Modified on 03/14/2018 9:42 am EDT

Are you ready to Go-Live?

Before you Go-Live, be sure you can do some of the most essential tasks within the system. If you have vital processes please be sure to add them in the blank boxes. This will help you to keep track of your progress.

Click here to download the Go-Live Checklist! 📎

Helpful Tips for Registration Go-Live

- Plan your Registration Go-Live for a Monday so that you are in the office and able to help parents if they have questions as they are going through the process.
- Create a walk through for parents to reference specific to their registration experience. Include screenshots and specific directions- this will help to cut down on calls to your office.
- If you notice there seems to be an issue for New or Existing parents while they are registering, go through a test registration to see if you can recreate the issue. If you are able to recreate the issue please send a screenshot and explanation of what was happening when the issue arose.

Helpful Tips for OnSite Go-Live

- At least one staff member should be given a user ID and password so they are able to login to the InSite Provider App (classroom management).
- Be sure student-teacher ratios have been entered on the setup > room page if you would like to monitor live ratios throughout the day on the InSite Provider App.
- You may want to print out parent/contact PIN numbers to have on hand for staff to help parents on site (Check In/Out PIN- Excel report found under Reports > Room/Program).
- *Note- any children who do not have ACTIVE schedules will not be able to be clocked in from the InSite Select App.*

Helpful Tips for Billing Go-Live

- Be sure all of your children have program/room assignments- Rooms, Start and End Dates, Days, Schedule and Rate.
- Be sure discounts have been added to children's records.
- Be sure Third-Party families have been split and Co-Pays have been entered.
- Check rates to ensure they have been entered correctly.

InSite Applications

Last Modified on 01/04/2019 12:51 pm EST

There are three applications that can be used along with the software:

- InSite Select - used for checking children in and out (staff can also use this application to clock in or out)
- InSite Provider - used by staff and admins for classroom management
- InSite Connect - used by parents to review their family's activity within a center

The InSite Select and InSite Provider applications can be used with Android or iOS tablets. The applications are not available on cellphones or traditional computers.

The InSite Connect application is only available on iOS or Android mobile devices.

InSite Provider User Guide

Last Modified on 10/09/2018 1:06 pm EDT

Simplify your center management with Cirrus Group, LLC' s InSite Provider edition for iPad. This app is designed for a streamlined, quick and easy way for your administrators and staff to access the important features of the Provider Editions of DayCare Works, SchoolCare Work, and RecCare Works at your points of service, or wherever you need. Information is automatically linked to your Cirrus Group, LLC hosted applications with real-time information updates and reporting capabilities.

The user guide has been broken down into each topic below. To View the entire InSite Provider App User Guide, click here - InSite Provider App.pdf 📎

General Navigation

Please review the below PDF for information regarding logging into the InSite Provider application and navigating the home screen.

InSite Provider App - General Navigation.pdf 📎

Menu Options

There are several options within the Menu icon on the top left corner of the screen. This menu is available from all screens within the InSite Provider application.

The following options are available from this menu:

- Classroom - navigates back to the home screen
- Live View - displays the staff/student ratio in each room in real time
- Today's Daily InSites - InSites added from the home screen can be viewed here for the current week
- Main Attendance - displays current attendance in each room, allows students to be Checked In/Out, mark students as Present, and Move students to other rooms

Review this link for instructions on how to navigate each menu option.

InSite Provider App - Menu Options.pdf 📎

Take Attendance

When selecting the Take Attendance action from the home screen, there are multiple options available:

- Check IN - check one or more students/staff into a room
- Check OUT - check one or more students/staff out of a room
- Delete Attendance - delete a student's attendance for current day (only one student at a time)
- Move - move one or more students/staff to a different room
- Present - mark one or more students as present

The PDF below discusses the filter options, offline attendance, how to check in/out staff and students, etc.

InSite Provider App - Take Attendance.pdf📎

Serve Meals

The Serve Meals option is a quick and easy way to record what meals were served/not served. Click the PDF below for instructions on adding and removing meals.

InSite Provider App - Serve Meals.pdf📎

Record an InSite

InSites are used for recording activities the students were involved in throughout the day. They can be added to a single student or multiple students. Activities can include naptime, reading, time out, etc. and are communicated to parents via the Parent Portal.

Please review the document below to Record an InSite.

InSite Provider App - Record an Insite.pdf📎

Add a Note

Notes can be added for various reasons. Like InSites, they can be added to a single student or multiple students. Notes can be set to General or Private. Review the link below for more information.

InSite Provider App - Add a Note.pdf📎

Device Requirements

Below is a list of devices that are compatible with the InSite Provider application:

- Apple iOS
    - Devices - iPad 2 and Above:
        - iPad 2
        - iPad 3
        - iPad 4
        - iPad Mini
        - iPad Mini 2
        - iPad Mini 3
        - iPad Mini 4
        - iPad Air
        - iPad Air 2
        - iPad Pro (12.9" & 9.7")
    - Software Version - iOS 8 and Above:
        - iOS 8
        - iOS 9
        - iOS 10
- Android
    - Devices - 7 inch and up, minimum 600 DP
    - Software Version - Android 4.0.3 and up (Jelly Bean)
- Kindle
    - Devices - 7 inch and up, minimum 600 DP
        - Kindle Fire HD
    - Software Version - Fire OS 5.3 and up

InSite Select User Guide

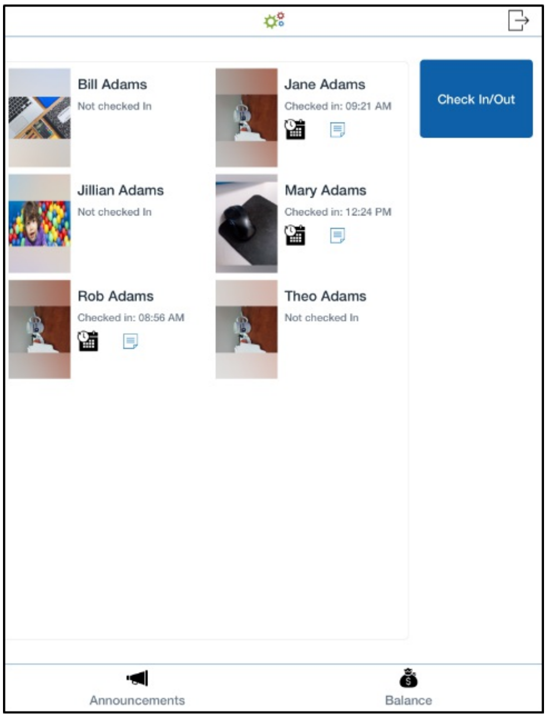
Last Modified on 10/09/2018 1:06 pm EDT

Simplify your center attendance and check in/check out process with Cirrus Group, LLC's InSite Select Application. This app is designed for a streamlined, quick and easy way to track attendance for parents and staff. Replace paper sign-in sheets, get accurate attendance information, push important announcements, and more!

To view the complete guide, click here - InSite Select App User Guide.pdf

Parent Options

When parents log into the InSite Select app, students in that family will display. Other options on the main screen include Check In/Out, Announcements, and Balance.



Bill Adams
Not checked In

Jane Adams
Checked in: 09:21 AM

Jillian Adams
Not checked In

Mary Adams
Checked in: 12:24 PM

Rob Adams
Checked in: 08:56 AM

Theo Adams
Not checked In

Check In/Out

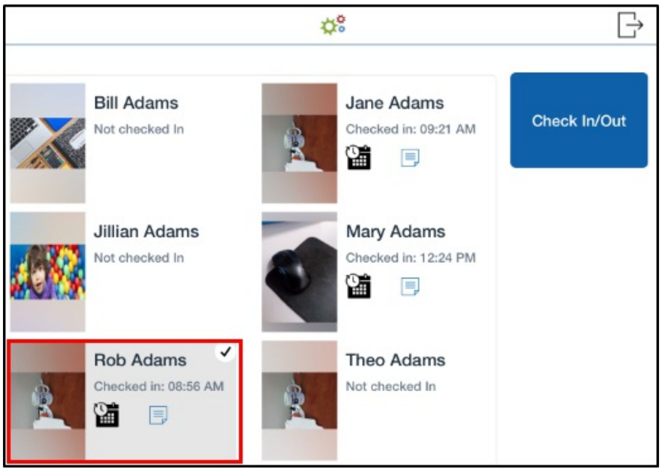
Parents have the ability to check in/out their students via the InSite Select app. Only students with schedules can be checked in; if they have a schedule, there will be a calendar icon below their name.

To check students in/out, follow the steps below:

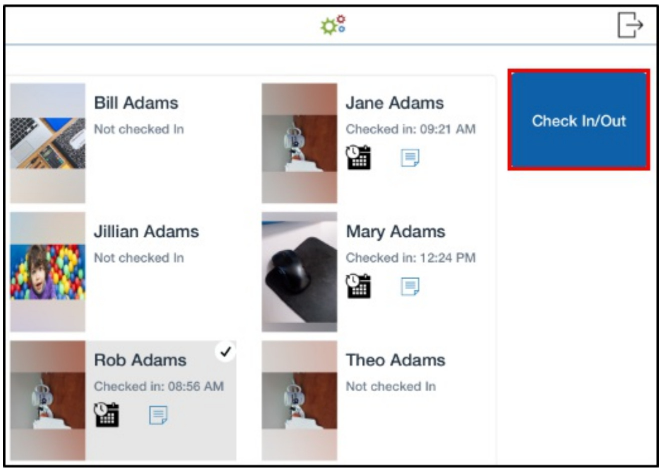
1. Enter PIN or click Scan QR Code to check in/out

    - To use the QR code for checking in/out, parents must first download the InSite Connect App

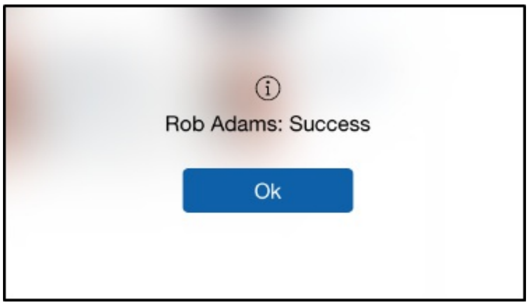
2. Click the green check-mark to log in
3. Select the student(s) to check in/out



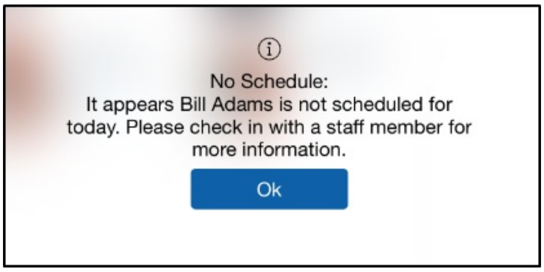
4. Click Check In/Out



5. If the student has a schedule, the following message will appear


Rob Adams: Success

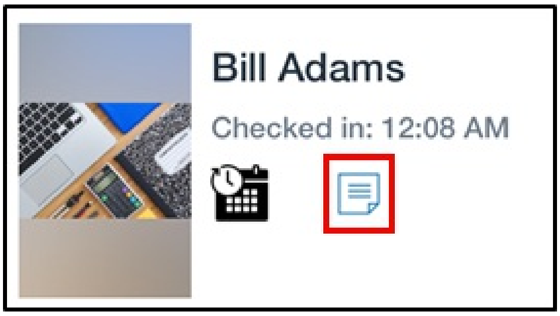
6. If the student does not have a schedule for the day, an error will be received


No Schedule:
It appears Bill Adams is not scheduled for today. Please check in with a staff member for more information.

Notes

Notes are added by staff members in the InSite Provider App.

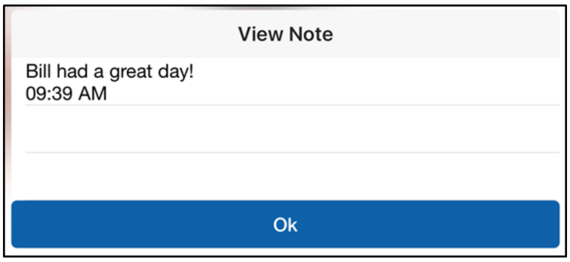
1. To view notes, click the paper icon



Bill Adams

Checked in: 12:08 AM

2. Review the information and click Ok

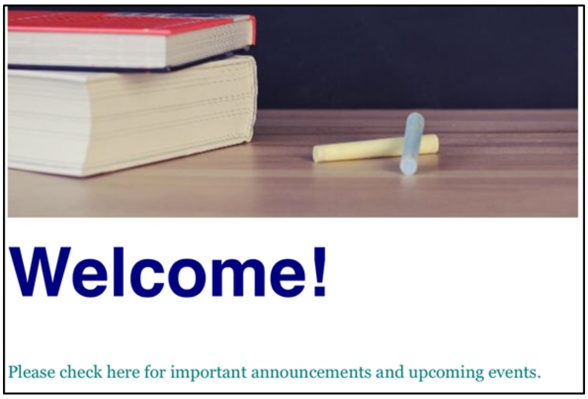


View Note

Bill had a great day!
09:39 AM

Announcements

Schoolwide announcements can be viewed by clicking the Announcements button on the bottom of the screen. Announcements can be added by navigating to the DayCare Works website and go to Connect>Announcements.

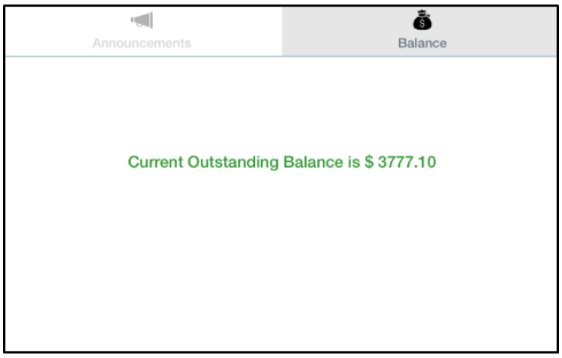


Welcome!

Please check here for important announcements and upcoming events.

Balance

Parents can view their current outstanding balance by clicking the Balance button at the bottom of the screen.

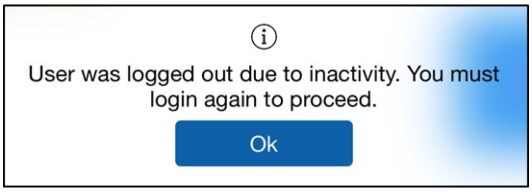


Current Outstanding Balance is $ 3777.10

Staff Options

Staff members can check in/out, transfer, and view announcements and their schedule.

Please Note: The InSite Select app will time out after 2 minutes of inactivity.

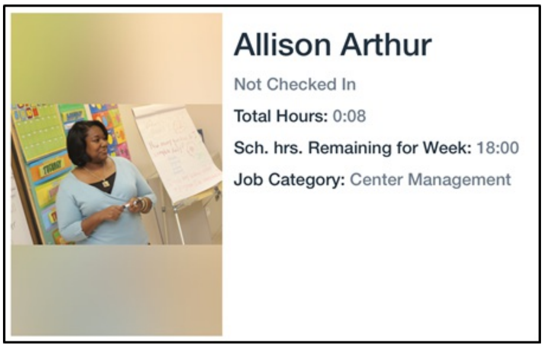


User was logged out due to inactivity. You must login again to proceed.

Check In/Out

1. Enter your PIN (four-six digits)
2. Select Staff

3. Click the green check-mark on the lower right corner
4. The main screen will display staff information, such as



Allison Arthur

Not Checked In

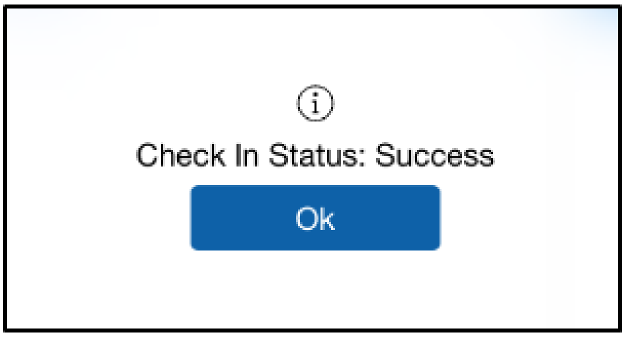
Total Hours: 0:08

Sch. hrs. Remaining for Week: 18:00

Job Category: Center Management

- First and Last Name
- Check in/out status and time

    - Total hours
    - Scheduled remaining hours for the week
    - Job Category
    - A photo
5. Click Check In/Check Out
6. Click Ok on the status screen

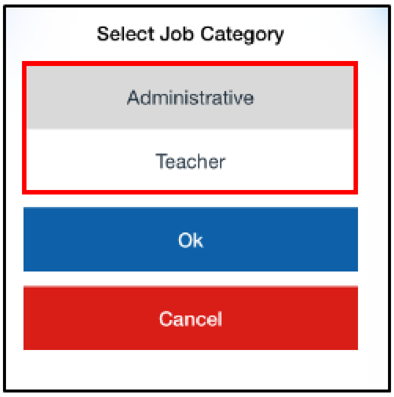


Check In Status: Success

Transfer

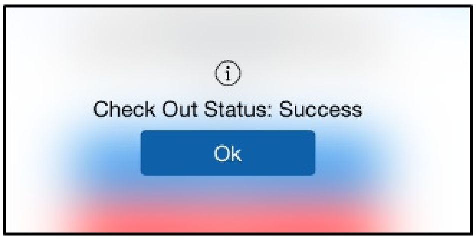
Once logged into the Select app, staff can transfer into another job category.

1. Click Transfer
2. Select a Job Category to transfer into, then click Ok



Select Job Category

3. Click Ok on the confirmation screen



Check Out Status: Success

Announcements

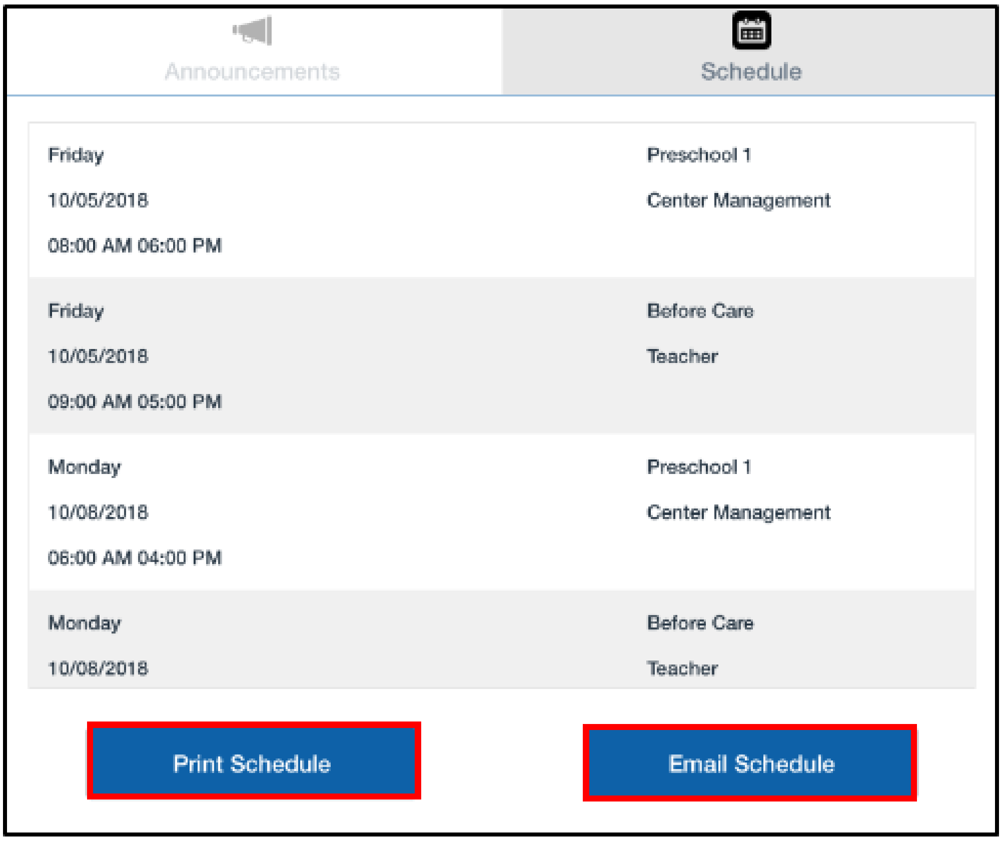
Announcements are added by administrators on the DayCare Works site under

Connect>Announcements.

Schedule

Staff members can also view, print or email their work schedule. To start, click the Schedule button at the bottom of the screen.

The staff's schedule will display, from there it can be printed or emailed.



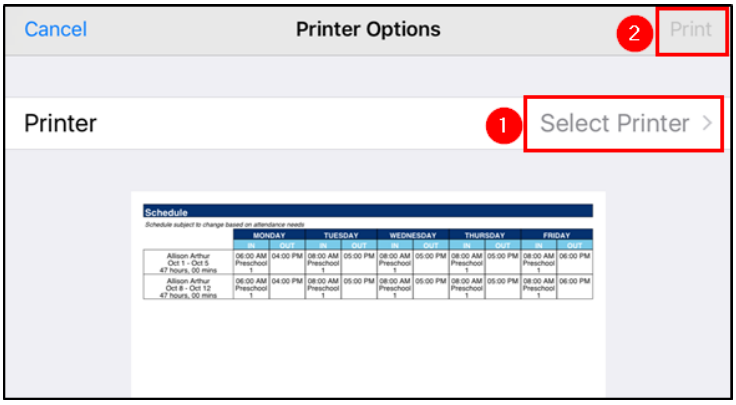
Friday
10/05/2018
08:00 AM 06:00 PM
Preschool 1
Center Management

Friday
10/05/2018
09:00 AM 05:00 PM
Before Care
Teacher

Monday
10/08/2018
06:00 AM 04:00 PM
Preschool 1
Center Management

Monday
10/08/2018
Before Care
Teacher

1. To print schedule:
    - Click Print Schedule
    - Select the Printer
    - Click Print



2. To email schedule:
    - Click Email Schedule
    - A confirmation screen will appear, click Ok

Success:
Your schedule was emailed to your account.

Device Requirements

Below is a list of devices that are compatible with the InSite Select application:

- Apple iOS
    - Devices - iPad 2 and Above:
        - iPad 2
        - iPad 3
        - iPad 4
        - iPad Mini
        - iPad Mini 2
        - iPad Mini 3
        - iPad Mini 4
        - iPad Air
        - iPad Air 2
        - iPad Pro (12.9" & 9.7")
    - Software Version - iOS 8 and Above:
        - iOS 8
        - iOS 9
        - iOS 10
- Android
    - Devices - 7 inch and up, minimum 600 DP
    - Software Version - Android 4.1 and up (Jelly Bean)
- Kindle
    - Devices - 7 inch and up, minimum 600 DP

    - Kindle Fire HD
  - Software Version - Fire OS 5.3 and up

InSite Connect User Guide

Last Modified on 10/09/2018 12:37 pm EDT

InSite Connect is a parent portal application that allows parents access to center and student information, along with access to a quick and easy QR code check in.

Application Installation

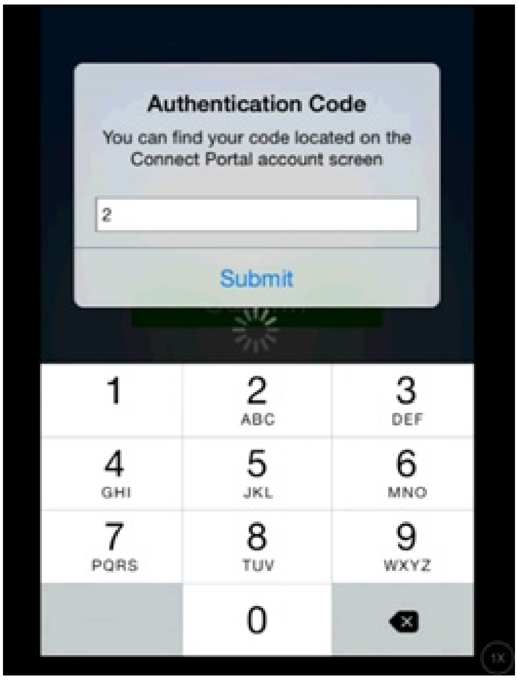
To download the InSite Connect application, navigate to the App Store or Google Play store on your mobile device. Search and download the InSite Connect application.

Logging In

1. Launch the InSite Connect application

2. Click the Settings icon on the bottom right corner of the screen

3. Enter the authentication code obtained from the Connect website

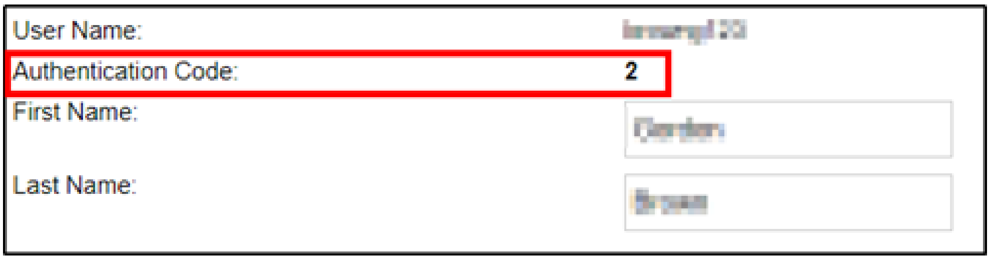


Authentication Code

You can find your code located on the Connect Portal account screen

2

- To access the Connect site navigate to Family.daycareworks.com
- Log in with the username and password provided by the center
- Click Account on the top right corner of the screen
- The Authentication code will be display on this screen under the user name. A new password can also be created on this screen



User Name:	[redacted]
Authentication Code:	2
First Name:	[redacted]
Last Name:	[redacted]

4. At the log in screen, enter the username and password and click Submit

InSite Connect Options

Once logged in, there are several options available on the home screen, such as communication, profile, and settings.

Communication

The communication section displays announcements from the center. Information added on the admin site under the Connect>Announcements menu will be immediately available for parents to view here. After clicking the Communication icon, the next screen will look like an inbox. Click a message to open and view the full message.

Welcome!

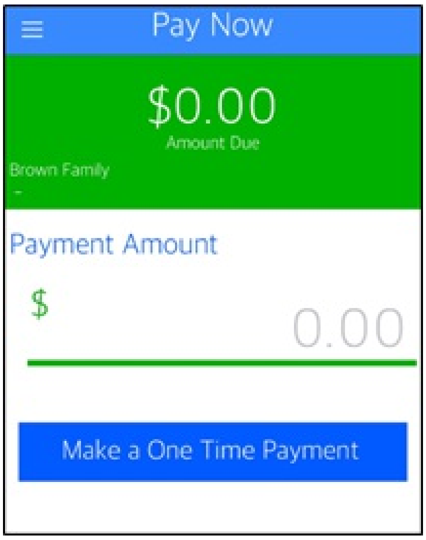
Please check here for important announcements and upcoming events.

Statement

The Statement section is where parents can see their current balance and statement.

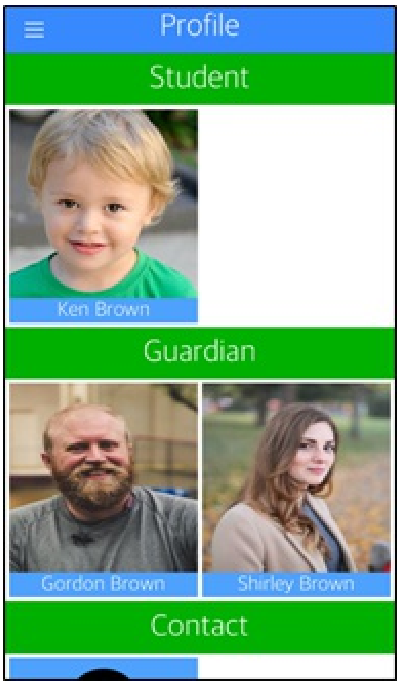
Pay Now

The Pay Now section provides parents the ability to make a payment on their account. To make a payment, they will need to enter the payment amount and click Make a One Time Payment. From there, they will enter their name, contact information, and payment information, then click Submit Payment.



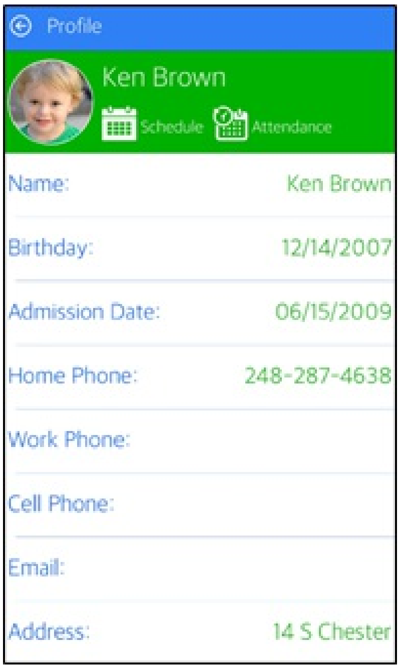
Profile

Parents can view profile information that is entered into the system. Each student, parent/guardian, and contact person will have their own profile. To view a profile, click on the person's name/photo.



The following information is included in each profile:

- Name
- Birthday
- Admission Date (for students)
- Phone Numbers (home, work, cell)
- Email Address
- Home Address

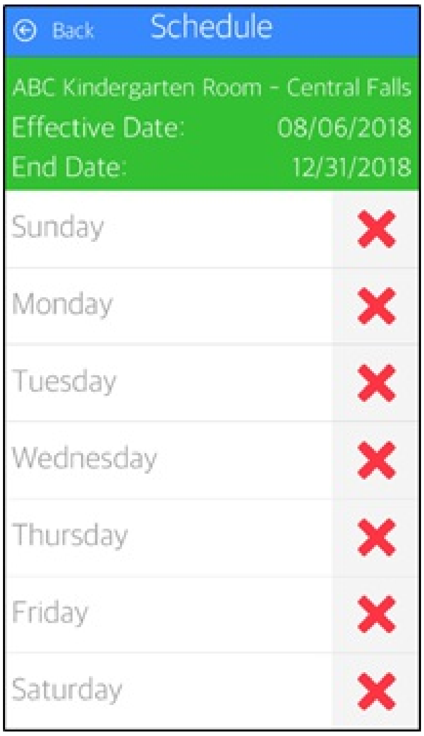


Ken Brown

Name:	Ken Brown
Birthday:	12/14/2007
Admission Date:	06/15/2009
Home Phone:	248-287-4638
Work Phone:	
Cell Phone:	
Email:	
Address:	14 S Chester

Schedule

Student profiles will also have a Schedule feature which contains their program name, start/end dates, and scheduled days of the week.



ABC Kindergarten Room - Central Falls

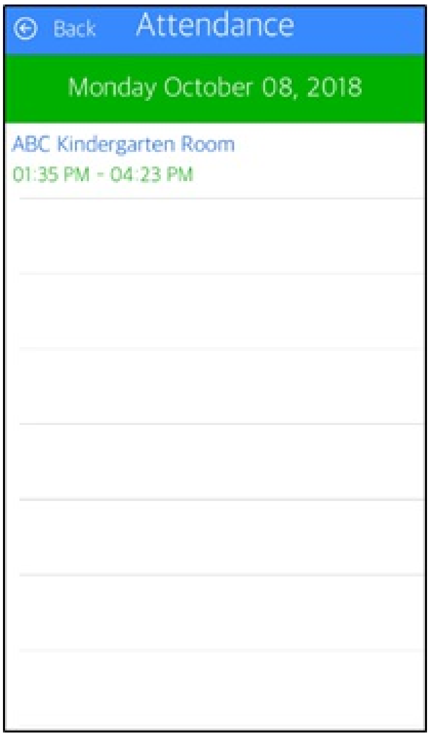
Effective Date: 08/06/2018

End Date: 12/31/2018

Sunday	✗
Monday	✗
Tuesday	✗
Wednesday	✗
Thursday	✗
Friday	✗
Saturday	✗

Attendance

There is also an Attendance feature under the student's profile. Parents can see what date and time the student was checked in and checked out of a specific room.

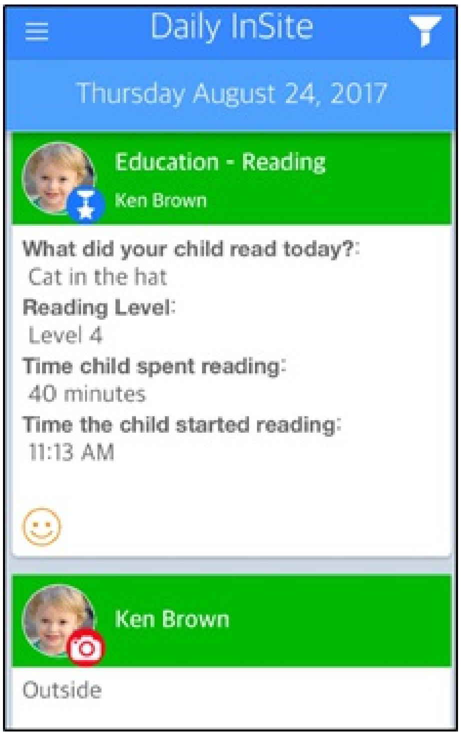


Monday October 08, 2018

ABC Kindergarten Room
01:35 PM - 04:23 PM

Daily InSite

Daily InSites are added from the InSite Provider app. Daily InSites provide parents with information about their student's day. Different categories can be added from the administrator side, such as reading, math, nap time, etc. Below is an example if an InSite a parent would see on the Connect app.



Thursday August 24, 2017

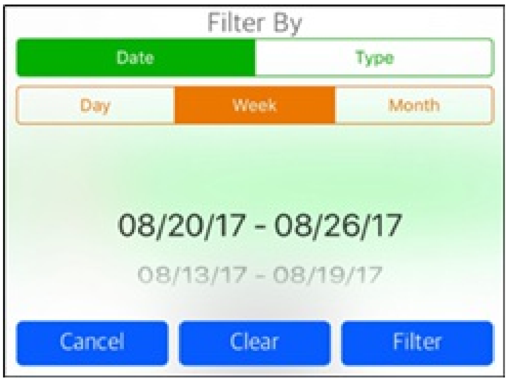
Education - Reading
Ken Brown

What did your child read today?:
Cat in the hat
Reading Level:
Level 4
Time child spent reading:
40 minutes
Time the child started reading:
11:13 AM

Ken Brown

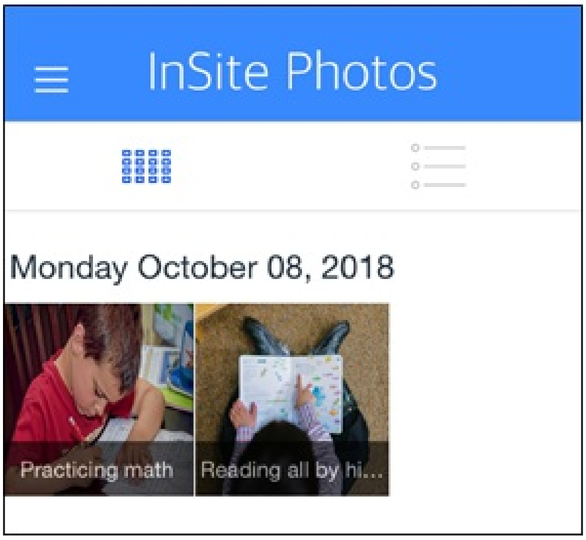
Outside

InSites can be filtered by clicking the filter icon on the top right corner of the InSite screen. They can be filtered by Date and Type.



InSite Photos

InSite Photos are added by staff members from the InSite Provider app. Photos are displayed by date, with the newest on top for parents to view. Staff members have the ability to add a caption with the picture.



Calendar

The Calendar displays a list of events that have been added by staff/administrators. This information is not tied to a specific program the student is enrolled in, but it can be displayed to a certain demographic within a center.

Calendar

October 2018

09 Tuesday

Picture Day!

10 Wednesday

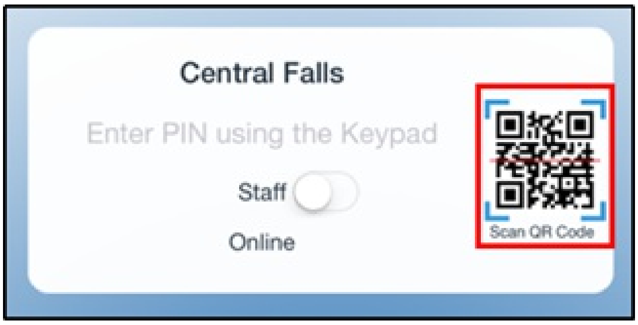
Field Trip to the Zoo

QR Code

By clicking the QR Code menu option, parents can use this to check their students in and out. To check in/out students using the QR code, follow the instructions below:

1. Launch and log in to the Connect app
2. Click QR Code from the main screen

3. At the center, click the Scan QR Code button on their device



4. A camera will open on the center's device. The parent will place their mobile device with the QR code under the camera to scan

5. Once the QR code is scanned, the parent will be directed to the home screen of the InSite Select app

Settings

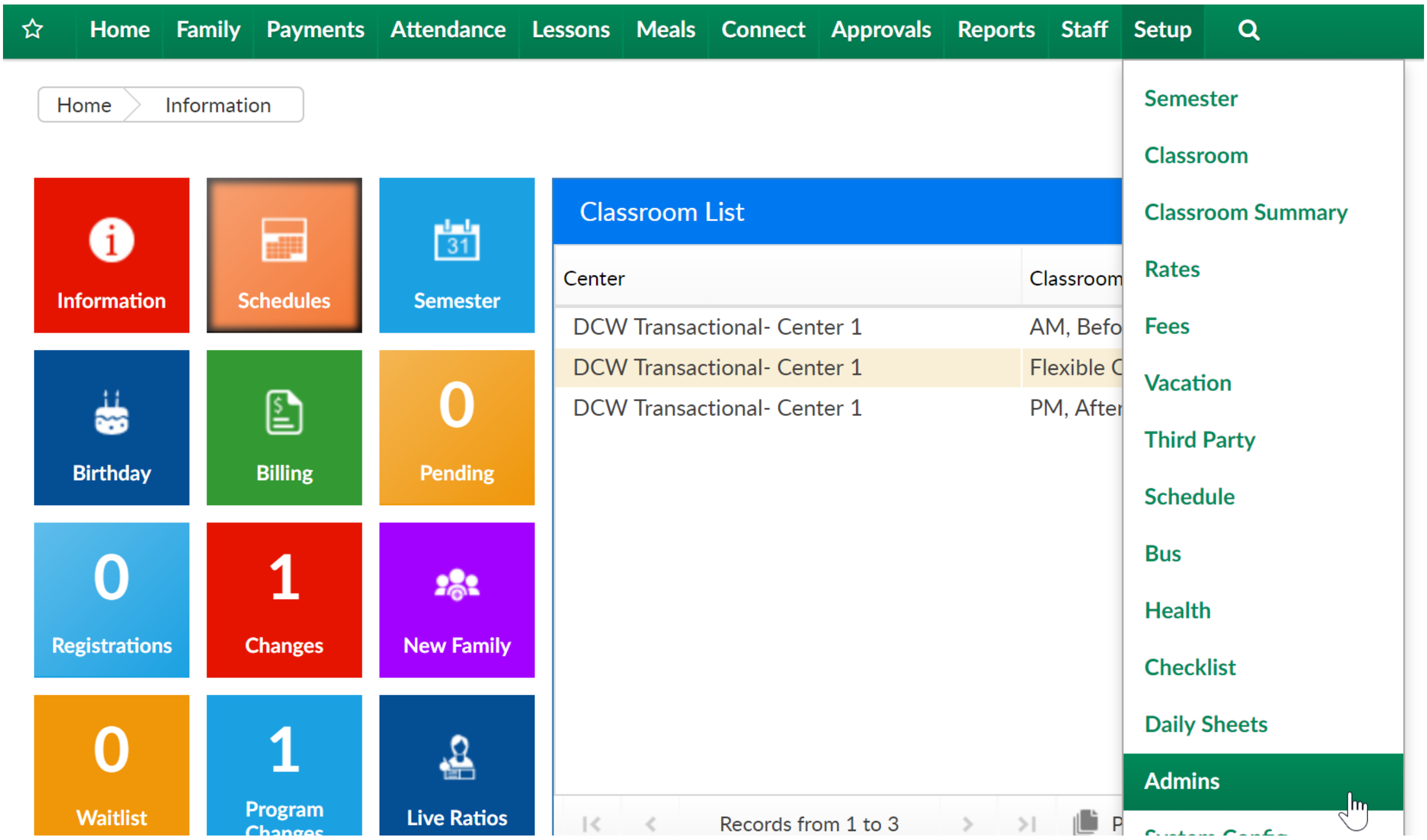
Under the Settings menu, there are two options: Auto Login and Authentication Code. When Auto Login is turned on (green), the parent will be automatically logged into their account upon launching the app. The Authentication Code is needed when first setting up the application in the settings button from the login screen. This code is also located in the parent's online account at Family.daycareworks.com

How to setup the Parent Portal Role

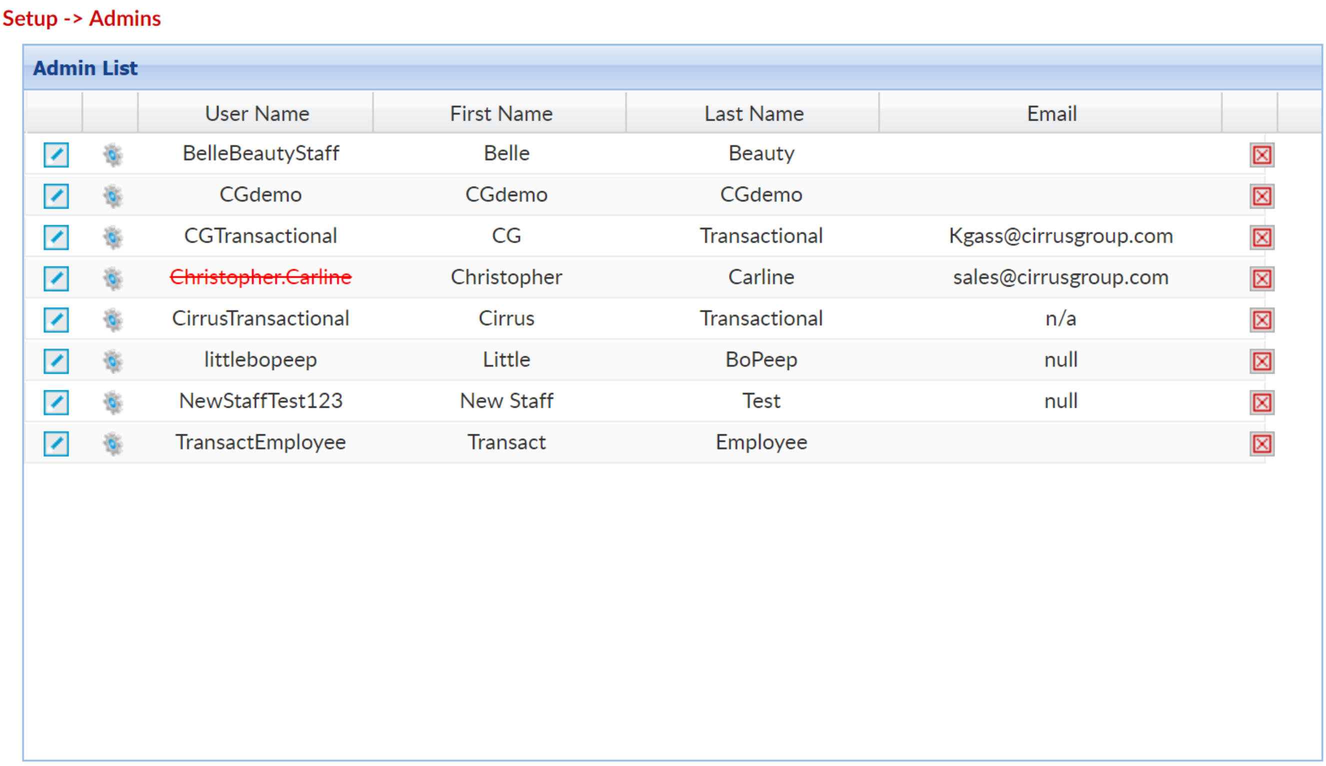
Last Modified on 05/02/2018 9:24 am EDT

Setting up parent roles allows administrators the ability to determine what tabs on the main toolbar parents will be able to view in the Connect Portal.

From the Setup menu, select the Admin option.



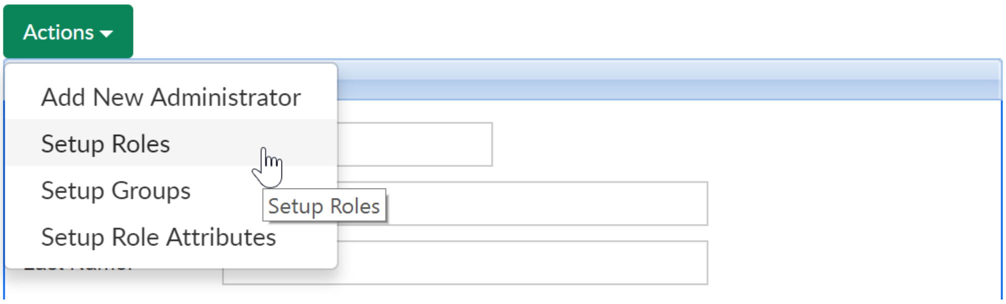
On the admin page, select the Setup Roles option.



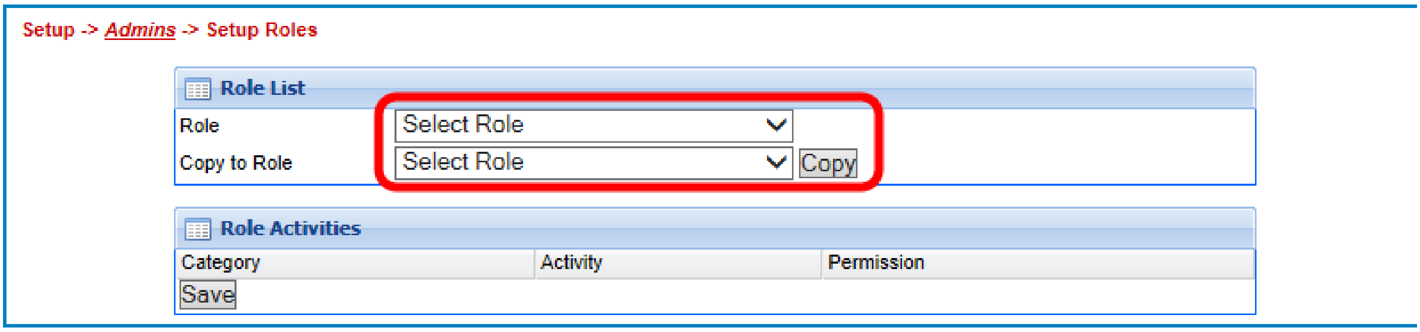
Setup -> Admins

Admin List

User Name	First Name	Last Name	Email
BelleBeautyStaff	Belle	Beauty	
CGdemo	CGdemo	CGdemo	
CGTransactional	CG	Transactional	Kgass@cirrusgroup.com
~~Christopher.Carline~~	Christopher	Carline	sales@cirrusgroup.com
CirrusTransactional	Cirrus	Transactional	n/a
littlebopeep	Little	BoPeep	null
NewStaffTest123	New Staff	Test	null
TransactEmployee	Transact	Employee	



Family Portal (Not Allowed) in the **Role** drop down list. *The **(Not Allowed)** implies that it's the role is not allowed for administrators. This role is only for parents via the Connect Portal.*



Setup -> *Admins* -> Setup Roles

Role List

Role	Select Role
Copy to Role	Select Role

Role Activities

Category	Activity	Permission

Then, select the permission for the parent in each of the columns.

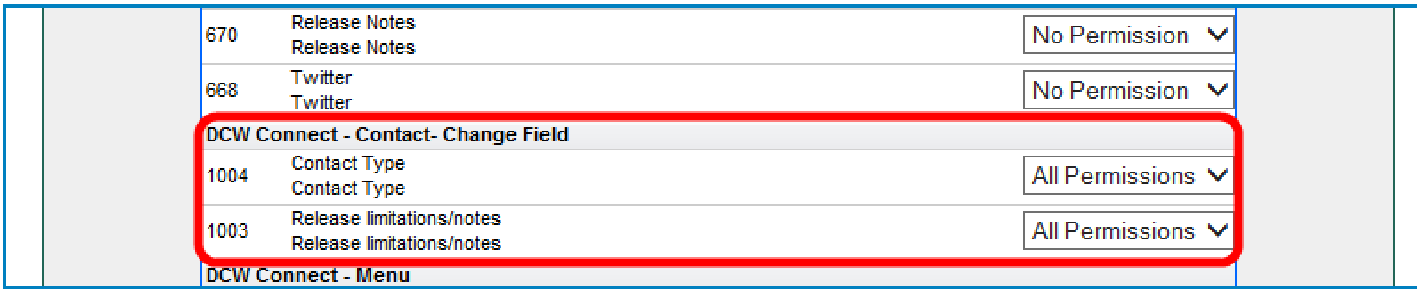
- Select **No Permission** to prevent parents from viewing this activity.
- Select **All Permissions** to allow parents the ability to view and edit the activity.
- Select **Read Only** to allow parents to view this activity but are unable to edit or

make changes to the section.

Scroll to the DCW Connect - Contact - Change Field section. This section is used to determine the the Connect Portal permissions for changing the emergency contact fields in the Connect Portal.

Contact Type: Allows a parent the ability to edit the type of contact for the emergency contact.

Release limitations/notes: Allows a parent the ability to edit the release limitations for notes for the emergency contact.



670	Release Notes Release Notes	No Permission
668	Twitter Twitter	No Permission
DCW Connect - Contact- Change Field		
1004	Contact Type Contact Type	All Permissions
1003	Release limitations/notes Release limitations/notes	All Permissions
DCW Connect - Menu		

Connect - Menu section. The Menu section refers to the main toolbar.

Attendance Menu: Allows a parents view the Attendance tab on the main toolbar. This tab displays a child's scheduled attendance. This is the tab that parents use to pick days for parent managed classrooms.

Auto-Pay: Determines if parents are able to view the Auto-Pay tab on the main toolbar. This tab allows parents to register or view credit cards for an auto-payment method through the Platform.

Calendar: Determines if parents are able to view the Calendar tab on the main toolbar. This tab allows parents to view online calendars and events setup by administrators.

Camps: Determines if parents are able to view the Camps tab on the main toolbar. This tab allows parents the ability to register for camps via the Connect Portal.

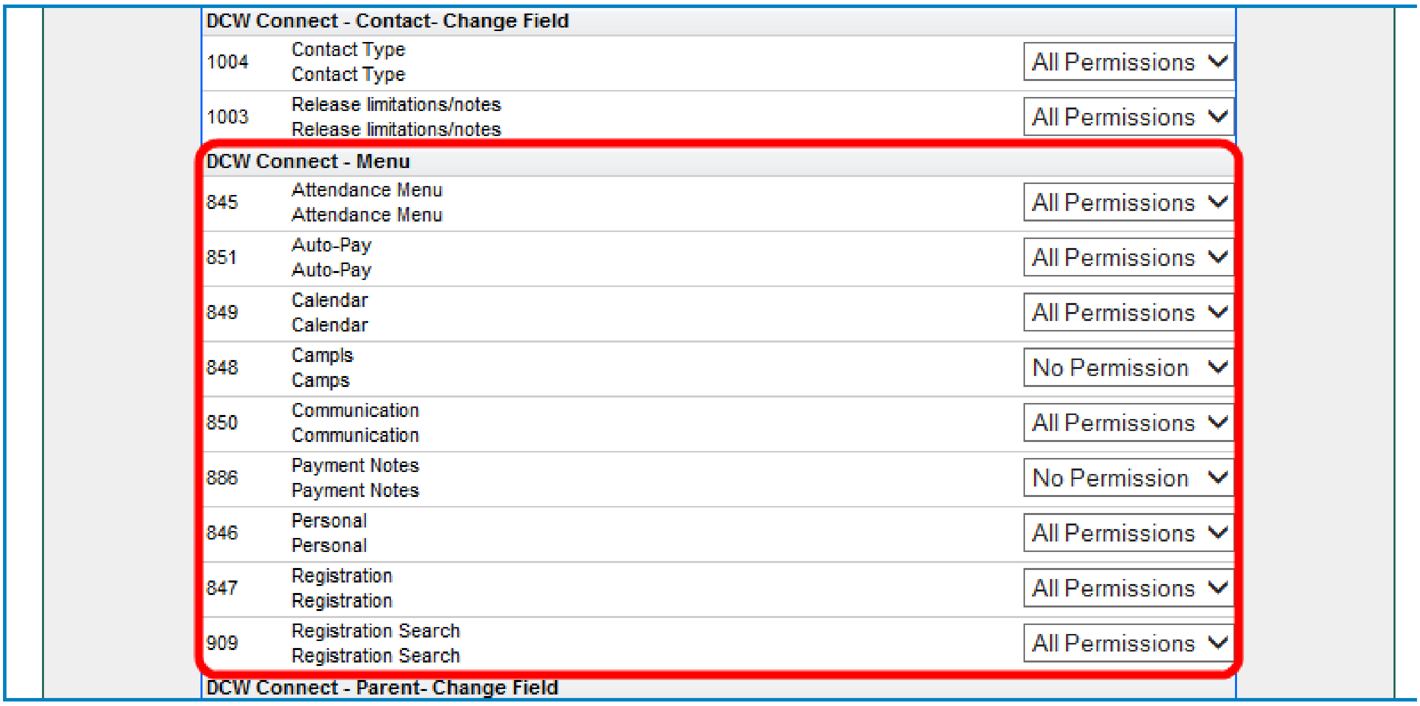
Communication: Determines if parents are able to view the Communication tab on the main toolbar. This tab displays documents, links and staff profiles shared to parents from the center.

Payment Notes: Determines if parents are able to leave notes on payments made in through the Platform.

Personal: Determines if parents are able to view the Personal tab on the main toolbar. This tab displays the child, parent and emergency contact information for the family.

Registration: Determines if parents are able to view the Registration tab on the main toolbar. This tab allows parents the ability to register for classrooms and events via the Connect Portal.

Registration Search: Determines if parents are able to search for programs during registration. Selecting No Permission will hide the search section for registration; parents will be required to pick the classroom for registration by selecting a category and category.



DCW Connect - Contact- Change Field		
1004	Contact Type Contact Type	All Permissions
1003	Release limitations/notes Release limitations/notes	All Permissions
DCW Connect - Menu		
845	Attendance Menu Attendance Menu	All Permissions
851	Auto-Pay Auto-Pay	All Permissions
849	Calendar Calendar	All Permissions
848	Campls Camps	No Permission
850	Communication Communication	All Permissions
886	Payment Notes Payment Notes	No Permission
846	Personal Personal	All Permissions
847	Registration Registration	All Permissions
909	Registration Search Registration Search	All Permissions
DCW Connect - Parent- Change Field		

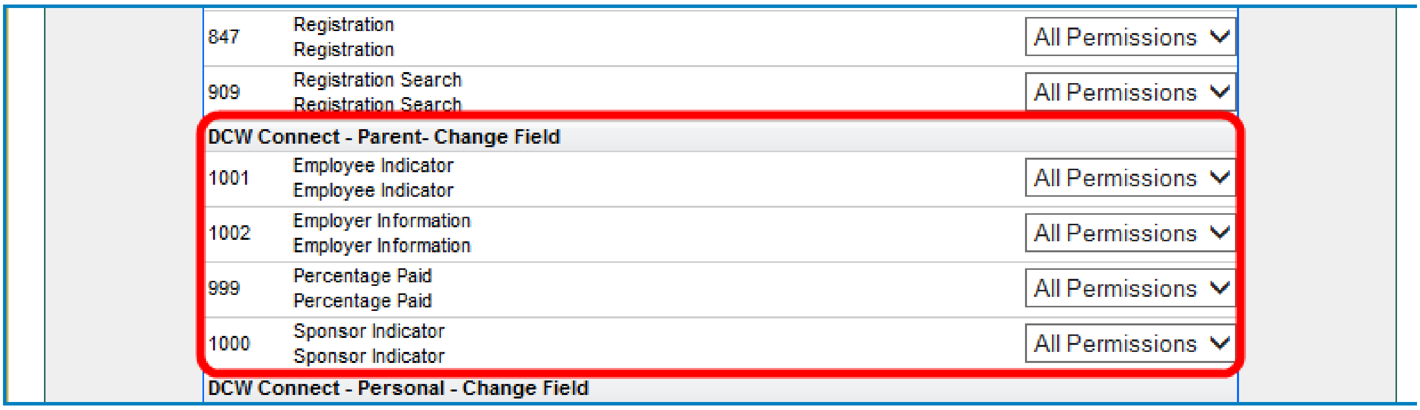
Connect - Parent - Change Field section. This determines the fields that a parent can change for a legal guardian in the Platform Connect.

Employee Indicator: Allows a parent to indicate if they are an employee within the center.

Employer Information: Allows a parent to enter employee information through the Platform Connect.

Percentage Paid: Allows a parent to enter the percentage that the parent is responsible to pay.

Sponsor Indicator: Allows a parent to indicate if they are a primary sponsor for a family's financial ledger.



847	Registration Registration	All Permissions
909	Registration Search Registration Search	All Permissions
DCW Connect - Parent- Change Field		
1001	Employee Indicator Employee Indicator	All Permissions
1002	Employer Information Employer Information	All Permissions
999	Percentage Paid Percentage Paid	All Permissions
1000	Sponsor Indicator Sponsor Indicator	All Permissions
DCW Connect - Personal - Change Field		

Connect - Personal - Change Field section. This determines the fields that a parent can change for their child in the Platform Connect.

Accommodations: Allows a parent to edit any required accommodations for a child.

ADD/ADHD: Allows a parent to edit the child's ADD or ADHD information.

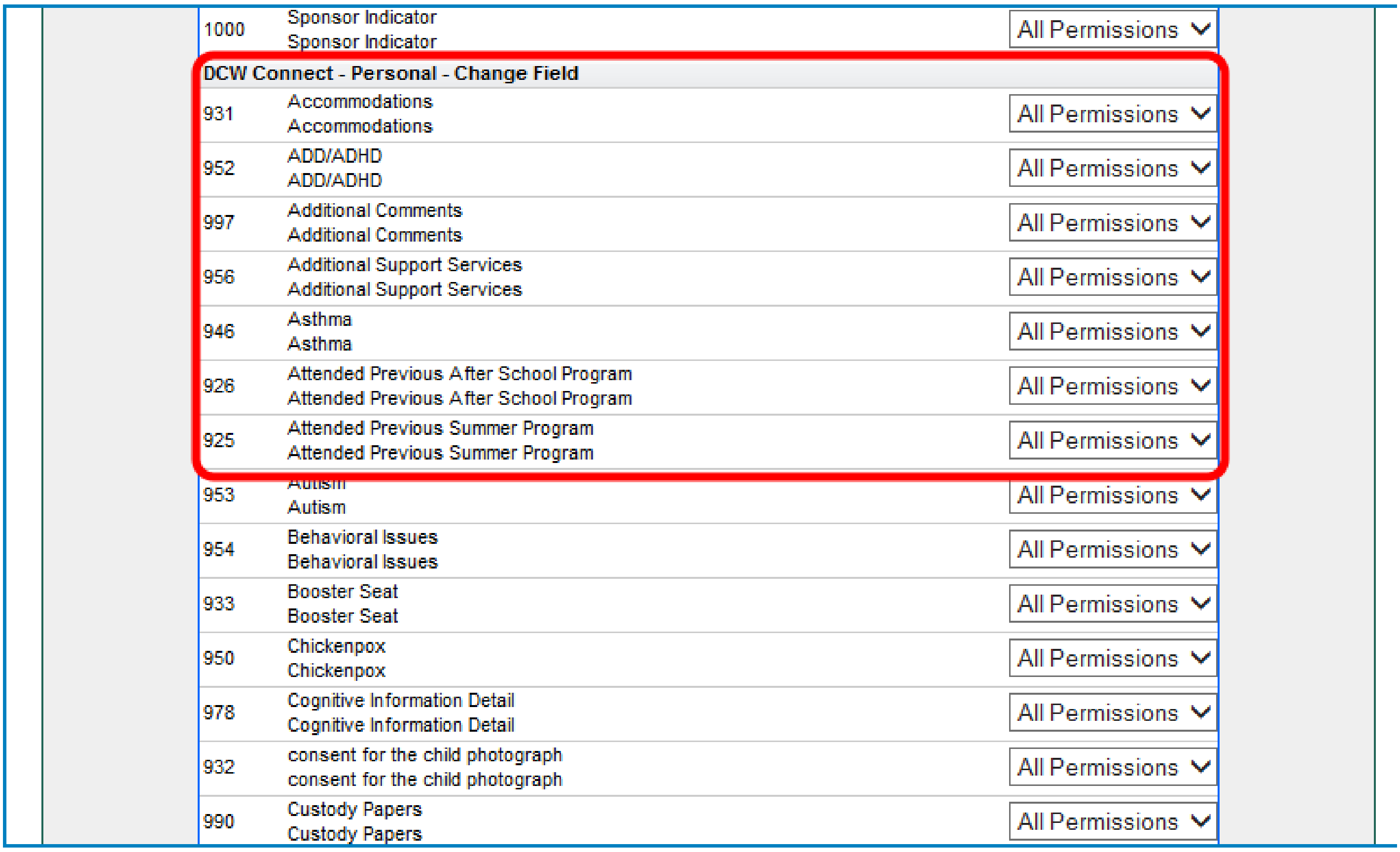
Additional Comments: Allows a parent to edit additional comments regarding the child.

Additional Support Services: Allows a parent to edit additional support service information for the child.

Asthm: Allows a parent to edit asthma information for the child.

Attended Previous After center Program: Allows a parent to edit if the child attended a previous after center program at the center.

Attended Previous Summer Program: Allows a parent to edit if the child attended a previous summer program.



1000	Sponsor Indicator Sponsor Indicator	All Permissions
DCW Connect - Personal - Change Field		
931	Accommodations Accommodations	All Permissions
952	ADD/ADHD ADD/ADHD	All Permissions
997	Additional Comments Additional Comments	All Permissions
956	Additional Support Services Additional Support Services	All Permissions
946	Asthma Asthma	All Permissions
926	Attended Previous After School Program Attended Previous After School Program	All Permissions
925	Attended Previous Summer Program Attended Previous Summer Program	All Permissions
953	Autism Autism	All Permissions
954	Behavioral Issues Behavioral Issues	All Permissions
933	Booster Seat Booster Seat	All Permissions
950	Chickenpox Chickenpox	All Permissions
978	Cognitive Information Detail Cognitive Information Detail	All Permissions
932	consent for the child photograph consent for the child photograph	All Permissions
990	Custody Papers Custody Papers	All Permissions

Autism: Allows a parent to edit if the child has autism.

Behavioral Issues: Allows a parent to edit any child behavioral issues.

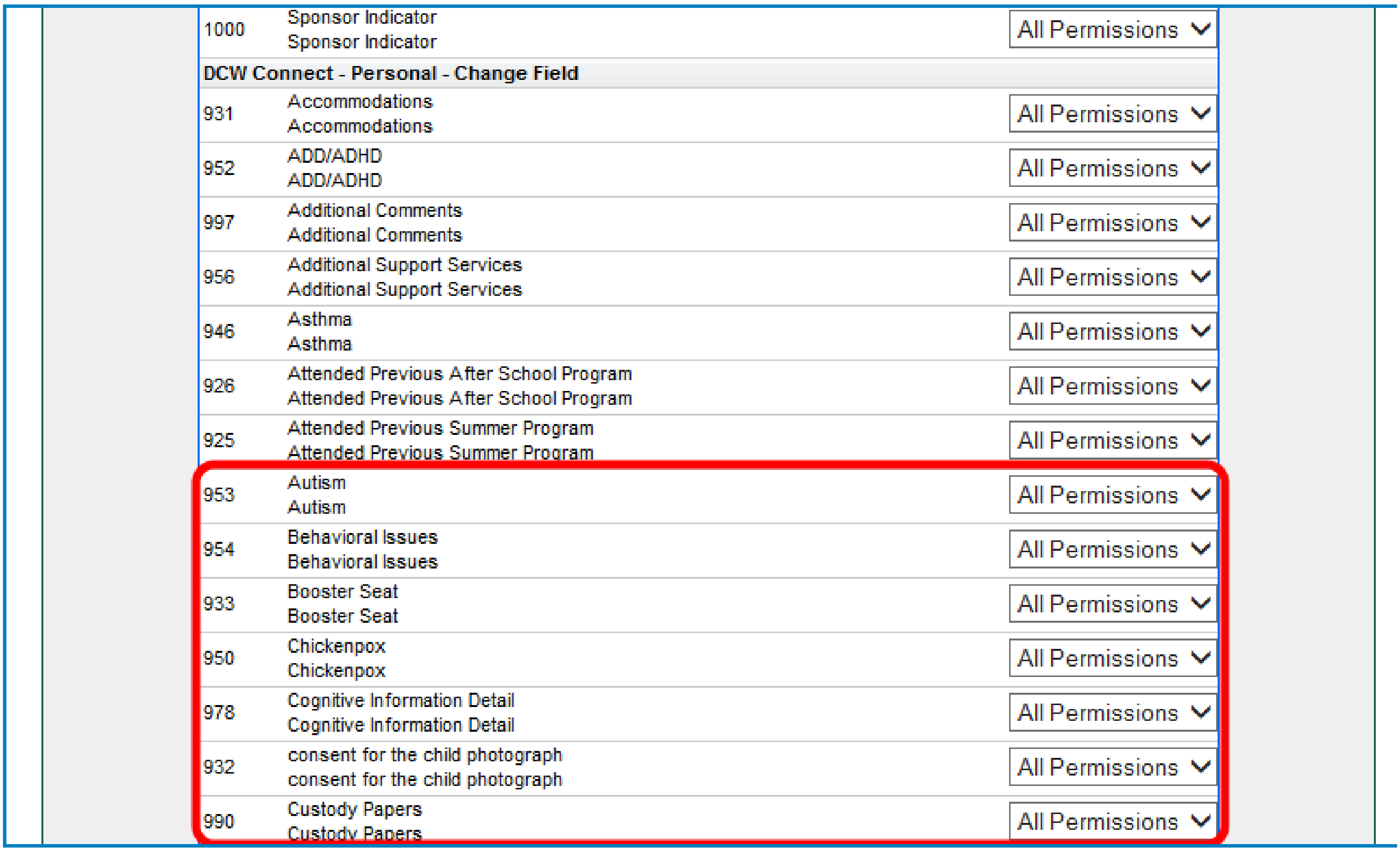
Booster Seat: Allows a parent to edit if the child uses a booster seat.

Chickenpox: Allows a parent to edit if the child has had chickenpox.

Cognitive Information Detail: Allows a parent to edit the cognitive information for the child.

Consent for the child photograph: Allows a parent to edit the consent for a child to be photographed.

Custody Papers: Allows a parent to edit if custody papers have been provided for a center.



1000	Sponsor Indicator Sponsor Indicator	All Permissions
DCW Connect - Personal - Change Field		
931	Accommodations Accommodations	All Permissions
952	ADD/ADHD ADD/ADHD	All Permissions
997	Additional Comments Additional Comments	All Permissions
956	Additional Support Services Additional Support Services	All Permissions
946	Asthma Asthma	All Permissions
926	Attended Previous After School Program Attended Previous After School Program	All Permissions
925	Attended Previous Summer Program Attended Previous Summer Program	All Permissions
953	Autism Autism	All Permissions
954	Behavioral Issues Behavioral Issues	All Permissions
933	Booster Seat Booster Seat	All Permissions
950	Chickenpox Chickenpox	All Permissions
978	Cognitive Information Detail Cognitive Information Detail	All Permissions
932	consent for the child photograph consent for the child photograph	All Permissions
990	Custody Papers Custody Papers	All Permissions

Date of Last Tetanus: Allows a parent to edit the date the child received their tetanus shot.

Diabetes: Allows a parent to edit a child's diabetes information.

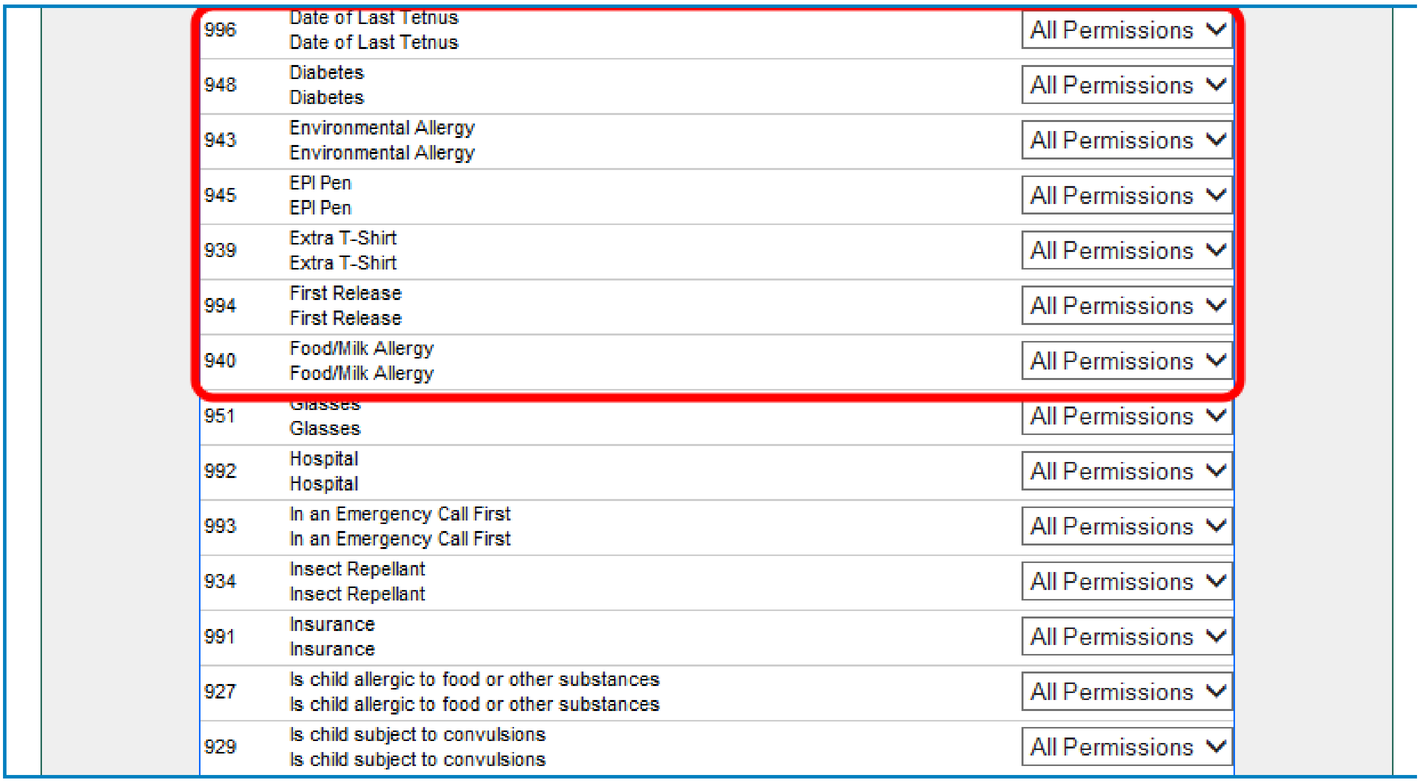
Environmental Allergy: Allows a parent to edit the environmental allergies for a child.

EPI Pen: Allows a parent to edit the EPI Pen information for the child.

Extra T-Shirt: Allows a parent to edit if a child should be provided an extra T-Shirt.

First Release: Allows a parent to edit a child's first release.

Food/Milk Allergy: Allows a parent to edit a child's food or milk allergy information.



996	Date of Last Tetnus Date of Last Tetnus	All Permissions
948	Diabetes Diabetes	All Permissions
943	Environmental Allergy Environmental Allergy	All Permissions
945	EPI Pen EPI Pen	All Permissions
939	Extra T-Shirt Extra T-Shirt	All Permissions
994	First Release First Release	All Permissions
940	Food/Milk Allergy Food/Milk Allergy	All Permissions
951	Glasses Glasses	All Permissions
992	Hospital Hospital	All Permissions
993	In an Emergency Call First In an Emergency Call First	All Permissions
934	Insect Repellant Insect Repellant	All Permissions
991	Insurance Insurance	All Permissions
927	Is child allergic to food or other substances Is child allergic to food or other substances	All Permissions
929	Is child subject to convulsions Is child subject to convulsions	All Permissions

Glasses: Allows a parent to edit if a child wears glasses or contact lenses.

Hospital: Allows a parent to edit a child's hospital information.

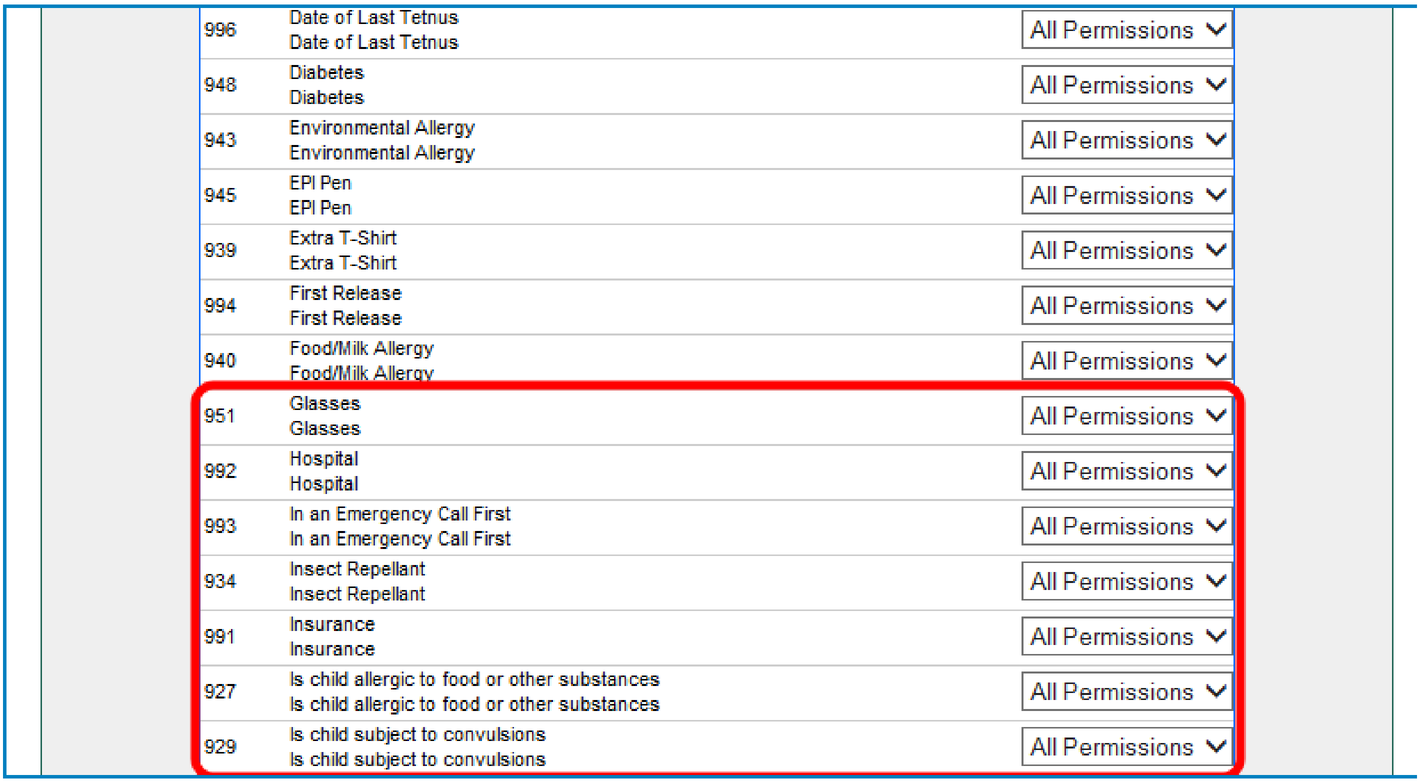
In an Emergency Call First: Allows a parent to edit the in case of emergency contact field for a child.

Insect Repellant: Allows a parent to edit if the center can apply insect repellant to a child.

Insurance: Allows a parent to edit the child's health insurance information.

Is child allergic to food or other substances: Allows a parent to edit the child's allergy information.

Is child subject to convulsion: Allows a parent to edit the child's convulsion information.



996	Date of Last Tetnus Date of Last Tetnus	All Permissions
948	Diabetes Diabetes	All Permissions
943	Environmental Allergy Environmental Allergy	All Permissions
945	EPI Pen EPI Pen	All Permissions
939	Extra T-Shirt Extra T-Shirt	All Permissions
994	First Release First Release	All Permissions
940	Food/Milk Allergy Food/Milk Allergy	All Permissions
951	Glasses Glasses	All Permissions
992	Hospital Hospital	All Permissions
993	In an Emergency Call First In an Emergency Call First	All Permissions
934	Insect Repellant Insect Repellant	All Permissions
991	Insurance Insurance	All Permissions
927	Is child allergic to food or other substances Is child allergic to food or other substances	All Permissions
929	Is child subject to convulsions Is child subject to convulsions	All Permissions

Is child usually susceptible to infection: Allows a parent to edit the child's infection information.

Is there any physical condition: Allows a parent to edit the child's physical condition information.

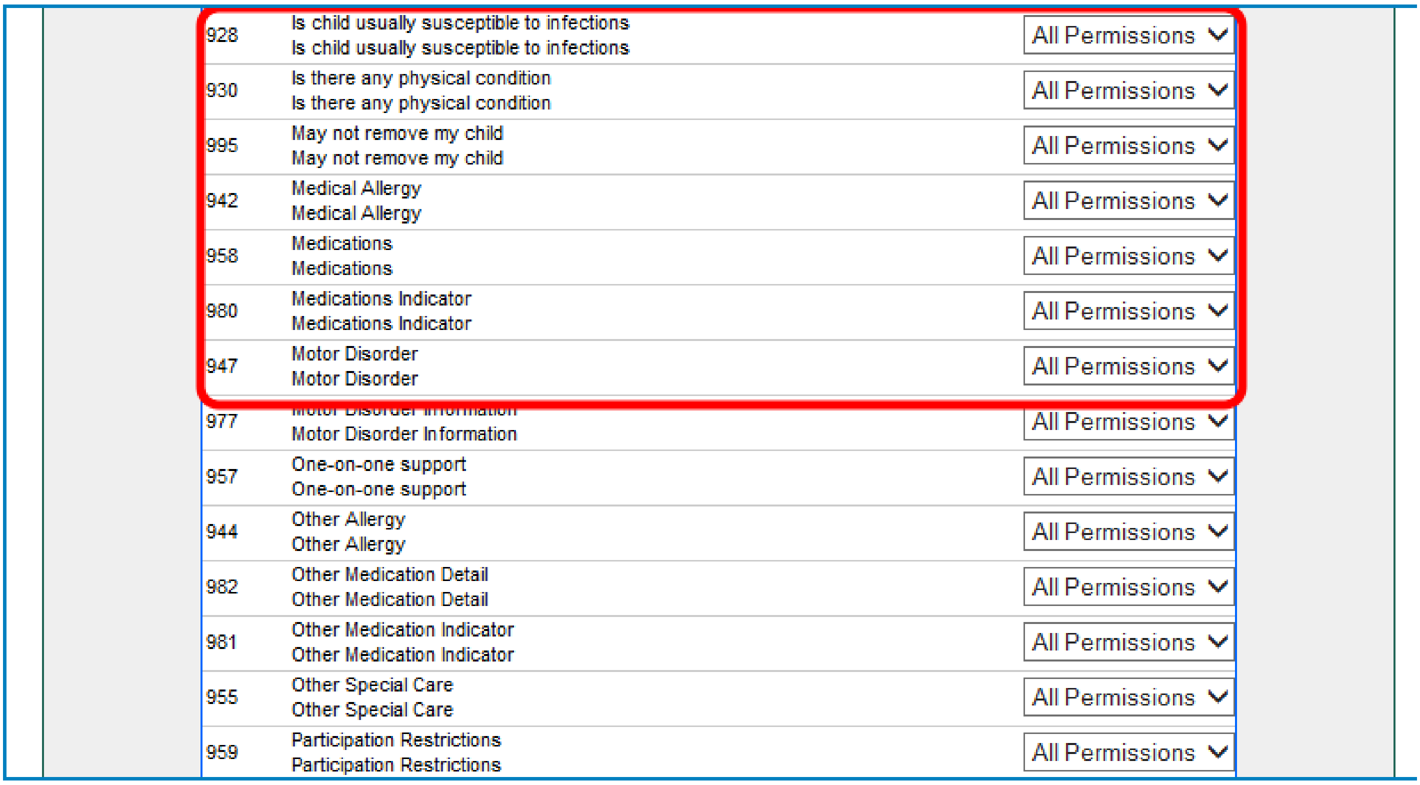
May not remove my child: Allows a parent to edit who is not able to remove the child from the center.

Medical Allergy: Allows a parent to edit the child's allergies to medication.

Medications: Allows a parent to edit the medication a child takes.

Medications Indicator: Allows a parent to edit any information for medication the child takes.

Motor Disorder: Allows a parent to edit any motor disorder information for the child.



928	Is child usually susceptible to infections Is child usually susceptible to infections	All Permissions
930	Is there any physical condition Is there any physical condition	All Permissions
995	May not remove my child May not remove my child	All Permissions
942	Medical Allergy Medical Allergy	All Permissions
958	Medications Medications	All Permissions
980	Medications Indicator Medications Indicator	All Permissions
947	Motor Disorder Motor Disorder	All Permissions
977	Motor Disorder Information	All Permissions
957	One-on-one support One-on-one support	All Permissions
944	Other Allergy Other Allergy	All Permissions
982	Other Medication Detail Other Medication Detail	All Permissions
981	Other Medication Indicator Other Medication Indicator	All Permissions
955	Other Special Care Other Special Care	All Permissions
959	Participation Restrictions Participation Restrictions	All Permissions

Motor Disorder Information: Allows a parent to edit any the indicator if a child has a motor disorder.

One-on-one support: Allows a parent to edit the child's one-on-one support information.

Other Allergy: Allows a parent to edit additional allergy information for the child.

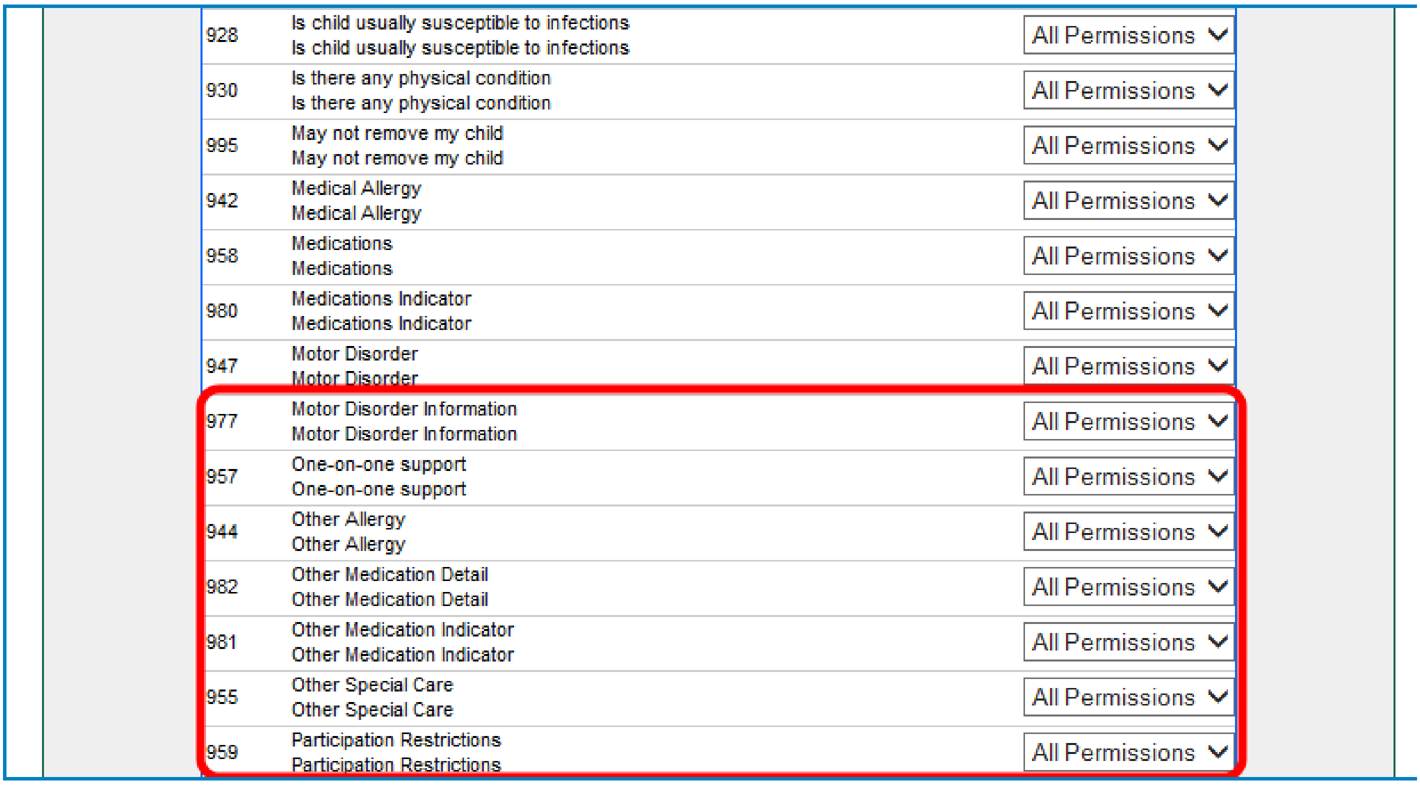
Other Medication Detail: Allows a parent to edit other medication information for the child.

Other Medication Indicator: Allows a parent to edit if the child has other medications.

Other Special Care: Allows a parent to edit any special care instructions for the child.

Participation Restrictions: Allows a parent to edit any restrictions for the child.

Participation Restrictions Indicator: Allows a parent to edit the child's restriction indicator.



928	Is child usually susceptible to infections Is child usually susceptible to infections	All Permissions
930	Is there any physical condition Is there any physical condition	All Permissions
995	May not remove my child May not remove my child	All Permissions
942	Medical Allergy Medical Allergy	All Permissions
958	Medications Medications	All Permissions
980	Medications Indicator Medications Indicator	All Permissions
947	Motor Disorder Motor Disorder	All Permissions
977	Motor Disorder Information Motor Disorder Information	All Permissions
957	One-on-one support One-on-one support	All Permissions
944	Other Allergy Other Allergy	All Permissions
982	Other Medication Detail Other Medication Detail	All Permissions
981	Other Medication Indicator Other Medication Indicator	All Permissions
955	Other Special Care Other Special Care	All Permissions
959	Participation Restrictions Participation Restrictions	All Permissions

Pickup Notes: Allows a parent to edit the pickup notes for the child.

Reassessment Information: Allows a parent to edit the reassessment information for the child.

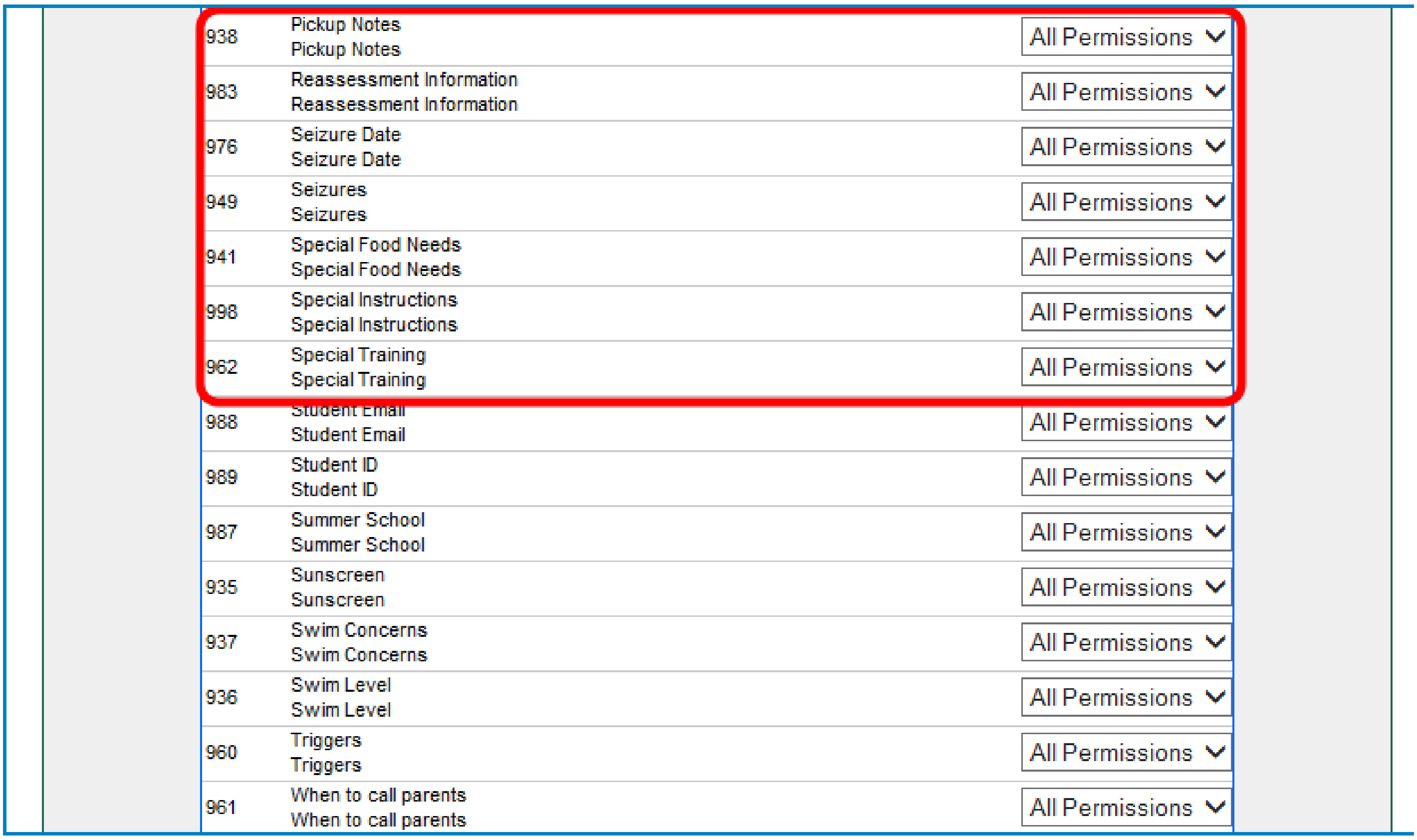
Seizure Date: Allows a parent to edit the date a child had a seizure.

Seizures: Allows a parent to edit information regarding the child's seizures.

Special Food Needs: Allows a parent to edit information regarding the child's special dietary needs.

Special Instructions: Allows a parent to edit any special instructions for the child.

Special Training: Allows a parent to edit any staff member who has received special training to work with the child.



938	Pickup Notes Pickup Notes	All Permissions
983	Reassessment Information Reassessment Information	All Permissions
976	Seizure Date Seizure Date	All Permissions
949	Seizures Seizures	All Permissions
941	Special Food Needs Special Food Needs	All Permissions
998	Special Instructions Special Instructions	All Permissions
962	Special Training Special Training	All Permissions
988	Student Email Student Email	All Permissions
989	Student ID Student ID	All Permissions
987	Summer School Summer School	All Permissions
935	Sunscreen Sunscreen	All Permissions
937	Swim Concerns Swim Concerns	All Permissions
936	Swim Level Swim Level	All Permissions
960	Triggers Triggers	All Permissions
961	When to call parents When to call parents	All Permissions

Student Email: Allows a parent to edit the email address for the child.

Student ID: Allows a parent to edit the identification number for the child.

Summer center: Allows a parent to edit if the child attended a summer center program.

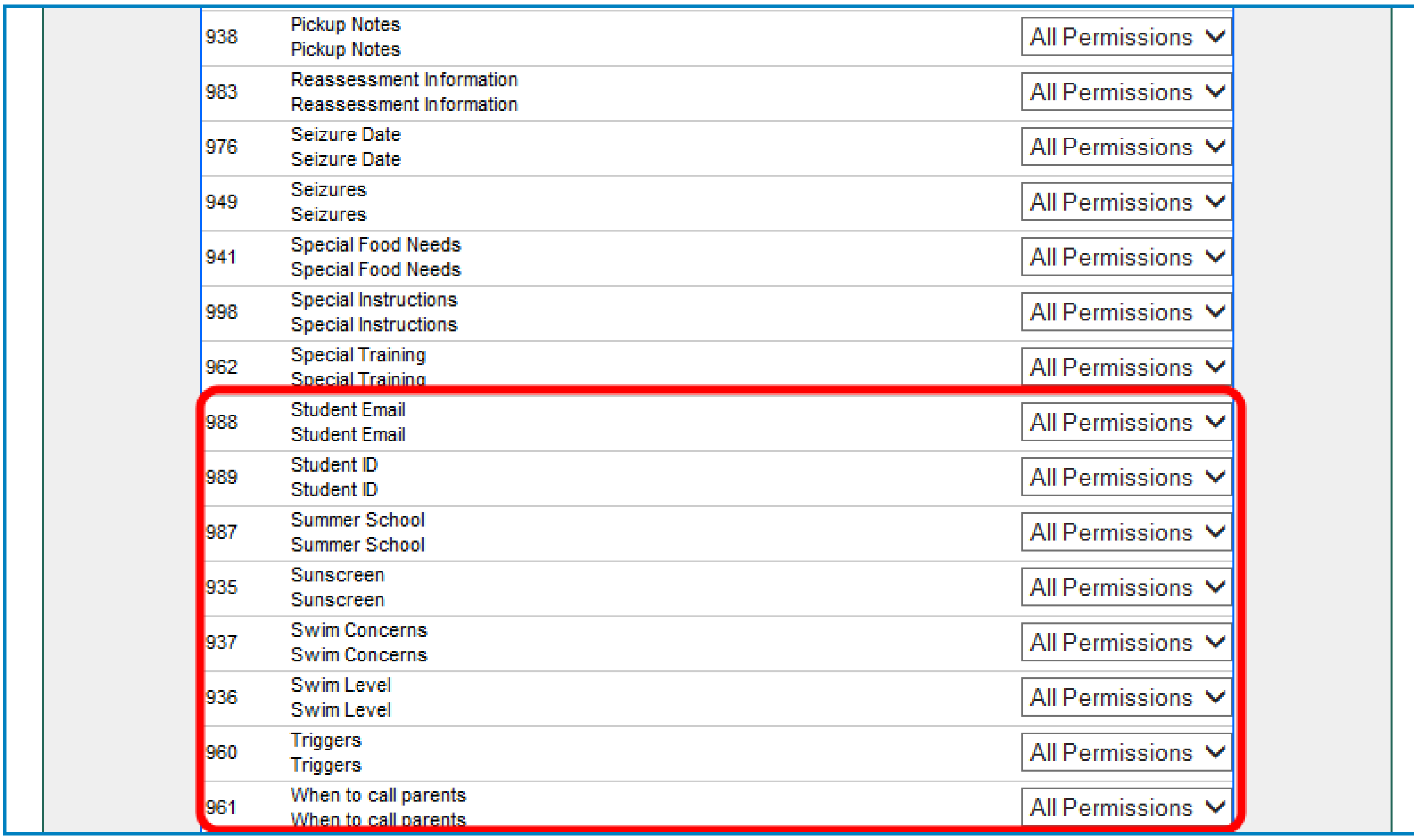
Sunscreen: Allows a parent to edit if sunscreen can be applied to the child.

Swim Concerns: Allows a parent to edit any swim concerns for the child.

Swim Level: Allows a parent to edit the swim level for the child.

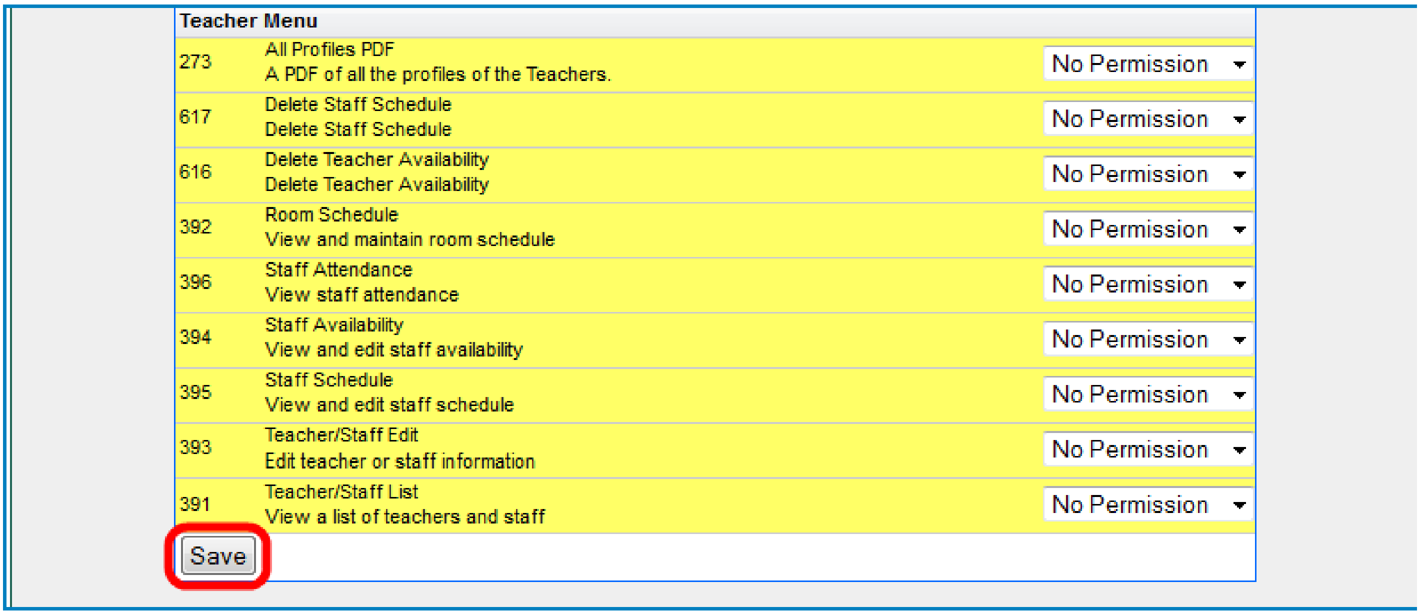
Triggers: Allows a parent to edit any triggers that staff members should be aware of for the child.

When to call parents: Allows a parent to edit when parents should be notified regarding the child.



938	Pickup Notes Pickup Notes	All Permissions
983	Reassessment Information Reassessment Information	All Permissions
976	Seizure Date Seizure Date	All Permissions
949	Seizures Seizures	All Permissions
941	Special Food Needs Special Food Needs	All Permissions
998	Special Instructions Special Instructions	All Permissions
962	Special Training Special Training	All Permissions
988	Student Email Student Email	All Permissions
989	Student ID Student ID	All Permissions
987	Summer School Summer School	All Permissions
935	Sunscreen Sunscreen	All Permissions
937	Swim Concerns Swim Concerns	All Permissions
936	Swim Level Swim Level	All Permissions
960	Triggers Triggers	All Permissions
961	When to call parents When to call parents	All Permissions

When finished, scroll down to the bottom of the screen and click on the**Save** button.



Teacher Menu		
273	All Profiles PDF A PDF of all the profiles of the Teachers.	No Permission
617	Delete Staff Schedule Delete Staff Schedule	No Permission
616	Delete Teacher Availability Delete Teacher Availability	No Permission
392	Room Schedule View and maintain room schedule	No Permission
396	Staff Attendance View staff attendance	No Permission
394	Staff Availability View and edit staff availability	No Permission
395	Staff Schedule View and edit staff schedule	No Permission
393	Teacher/Staff Edit Edit teacher or staff information	No Permission
391	Teacher/Staff List View a list of teachers and staff	No Permission

Parent Portal Overview

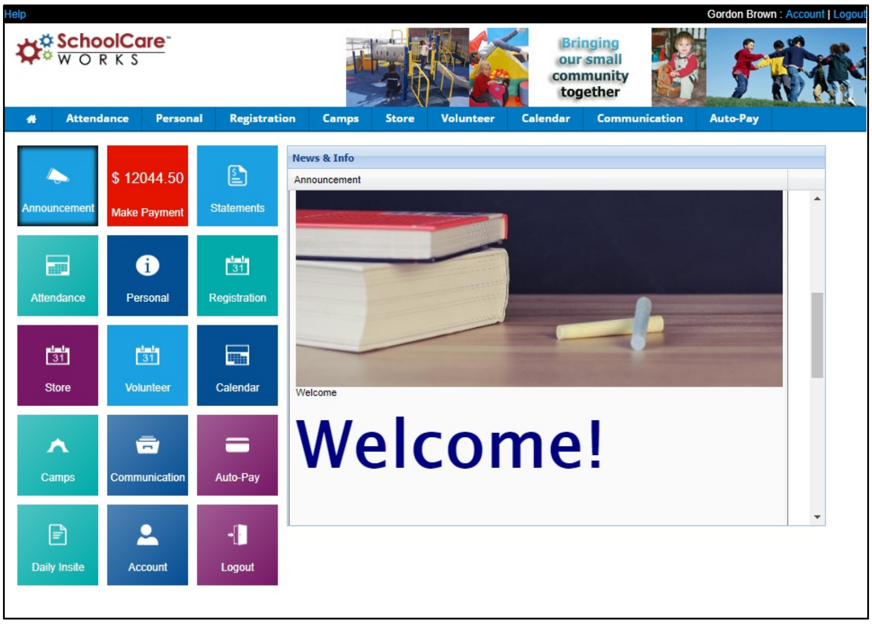
Last Modified on 11/02/2018 1:40 pm EDT

Connect is a parent portal where families can see information about a center's programs, pull statements, make payments, and more.

To login, navigate to:

- http://family.daycareworks.com
- http://connect.schoolcareworks.com

When parents first log in, the first screen that will display is the News & Info section. The tiles that display on this page are customizable, which means a site can choose how they want parents to be able to interact with the business/center.



To customize what is seen on the parent portal, the Family Portal (Not Allowed) role must be setup from the admin side. If the role is not customized, all options will display and be available to parents/guardians. Click here for how to setup/customize the parent portal role

- Parent Portal, Announcements - displays announcements made from the admin side of the site by going to the Connect > Announcements tab. Announcements can be customized to display based off of category/program criteria.
- Parent Portal, Statements - parents/guardians can select the statement tile to pull current and user defined period statements. This is also where users will be

able to pull year-end tax statements based off what has been paid through the system.

- Parent Portal, Attendance - Parents are able to see when their student has attended a program, and select days if a site is using a parent managed calendar for scheduling.
- Parent Portal, Personal - Allows parents to add new students to a center and update personal information for students, parents/guardians, or other contacts.
- Parent Portal, Registration - This is where parents can sign their students up for new programming as made available by a center, this may include yearly program registration, full day sign ups, enrichment programs, or summer options.
- Parent Portal, Store - If a site would like to mark programs as a "store" item, parents would be able to select the store icon from the home page to view all available items. Items may include shirts, program fees, etc. Inventory is controlled based off the capacity set at the room or semester level by a site.
- Parent Portal, Volunteer - Sites are able to setup rooms to allow parents and contacts to register as volunteers, this may be for a specific day or just generally to the site. This tile will display only volunteer type rooms/programs setup from the admin site.
- Parent Portal, Calendar - The Calendar area is where a site can create a parent facing calendar of events; this is done from the Connect > Calendar area of the admin side.
- Parent Portal, Camps - The Camps tile displays all Camp type rooms/programs that have been setup on the admin side.
- Parent Portal, Communication - Parents can see generic documents, links and staff profiles.
- Parent Portal, Auto-Pay - Parents/guardians can register a payment method for automatic deductions, this will be based off business defined settings.
- Parent Portal, Daily InSite - Parents can see any activities or photos that have been added for their student throughout the day/week/month.
- Parent Portal, Account - The account page is where parents will be able to see their user name, update their password or link their accounts (multiple sites).

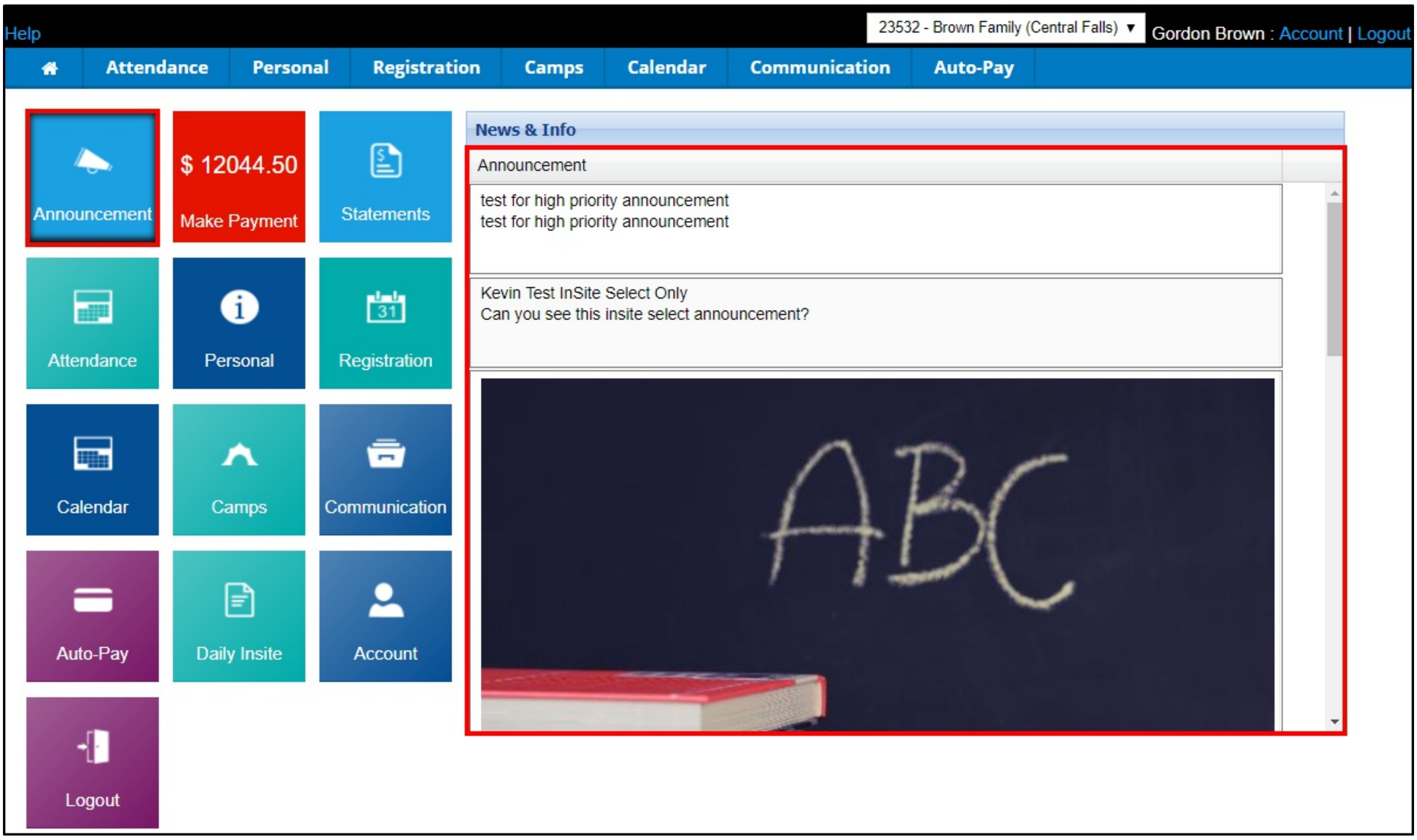
- Parent Portal, Logout

Parent Portal - Announcements

Last Modified on 10/25/2018 3:46 pm EDT

Announcements display generic notes from the school or site. As soon as a school adds an announcement, it is immediately ready for parent review. The newest update will be on the top.

Check back for important information, phone numbers, or events!



Announcement

test for high priority announcement
test for high priority announcement

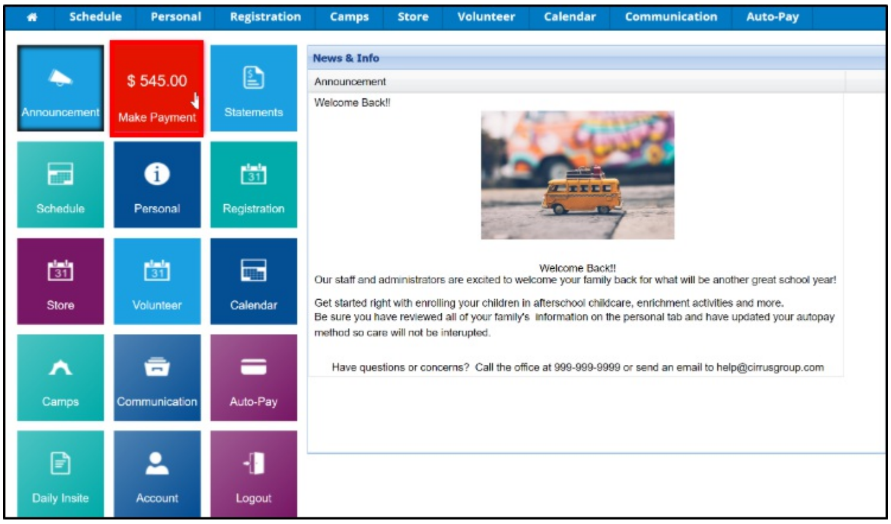
Kevin Test InSite Select Only
Can you see this insite select announcement?

Parent Portal - One Time Payments

Last Modified on 11/02/2018 12:31 pm EDT

The Make Payment tile will display when a center has online payments setup. When this tile is selected, the parent will be able to submit a one time payment for the amount of their choice.

1. Click the Make Payment tile



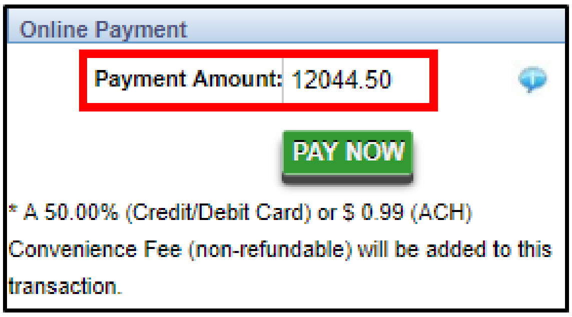
Welcome Back!!

Welcome Back!!
Our staff and administrators are excited to welcome your family back for what will be another great school year!

Get started right with enrolling your children in afterschool childcare, enrichment activities and more.
Be sure you have reviewed all of your family's information on the personal tab and have updated your autopay method so care will not be interupted.

Have questions or concerns? Call the office at 999-999-9999 or send an email to help@cirrusgroup.com

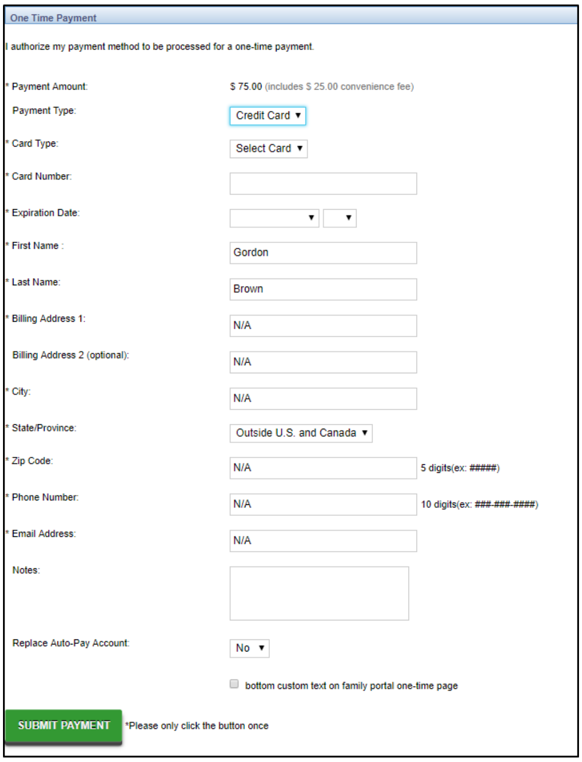
2. The account current balance will default in the Amount field. Enter the Payment Amount



Payment Amount: 12044.50

* A 50.00% (Credit/Debit Card) or $ 0.99 (ACH) Convenience Fee (non-refundable) will be added to this transaction.

3. Click Pay Now. Take note of the convenience fees charged by the center that will be added into the payment total
4. Enter the payment information and contact information of payer



One Time Payment

I authorize my payment method to be processed for a one-time payment.

* Payment Amount:	$ 75.00 (includes $ 25.00 convenience fee)	
Payment Type:	Credit Card ▾	
* Card Type:	Select Card ▾	
* Card Number:		
* Expiration Date:	▾ ▾	
* First Name :	Gordon	
* Last Name:	Brown	
* Billing Address 1:	N/A	
Billing Address 2 (optional):	N/A	
* City:	N/A	
* State/Province:	Outside U.S. and Canada ▾	
* Zip Code:	N/A	5 digits(ex: #####)
* Phone Number:	N/A	10 digits(ex: ###-###-####)
* Email Address:	N/A	
Notes:		
Replace Auto-Pay Account:	No ▾	
	☐ bottom custom text on family portal one-time page	

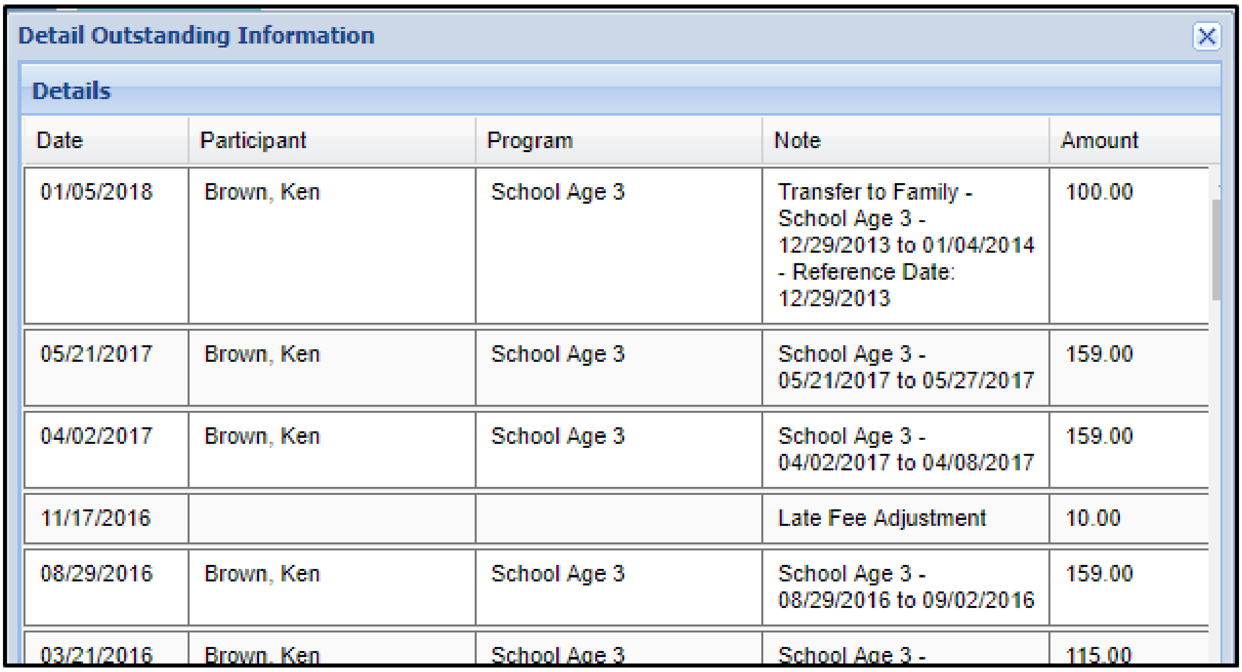
*Please only click the button once

5. Click Submit Payment
6. A payment confirmation email will be sent to the parent if the template has been setup. Admins, click here for instructions on Email Template Setup.

Parent Portal - Make Payment - Outstanding Balance

Last Modified on 11/02/2018 12:32 pm EDT

Parents can view the details of their outstanding balance by clicking the ℹ icon. The following screen will appear:



Date	Participant	Program	Note	Amount
01/05/2018	Brown, Ken	School Age 3	Transfer to Family - School Age 3 - 12/29/2013 to 01/04/2014 - Reference Date: 12/29/2013	100.00
05/21/2017	Brown, Ken	School Age 3	School Age 3 - 05/21/2017 to 05/27/2017	159.00
04/02/2017	Brown, Ken	School Age 3	School Age 3 - 04/02/2017 to 04/08/2017	159.00
11/17/2016			Late Fee Adjustment	10.00
08/29/2016	Brown, Ken	School Age 3	School Age 3 - 08/29/2016 to 09/02/2016	159.00
03/21/2016	Brown, Ken	School Age 3	School Age 3 -	115.00

Parent Portal - Statements

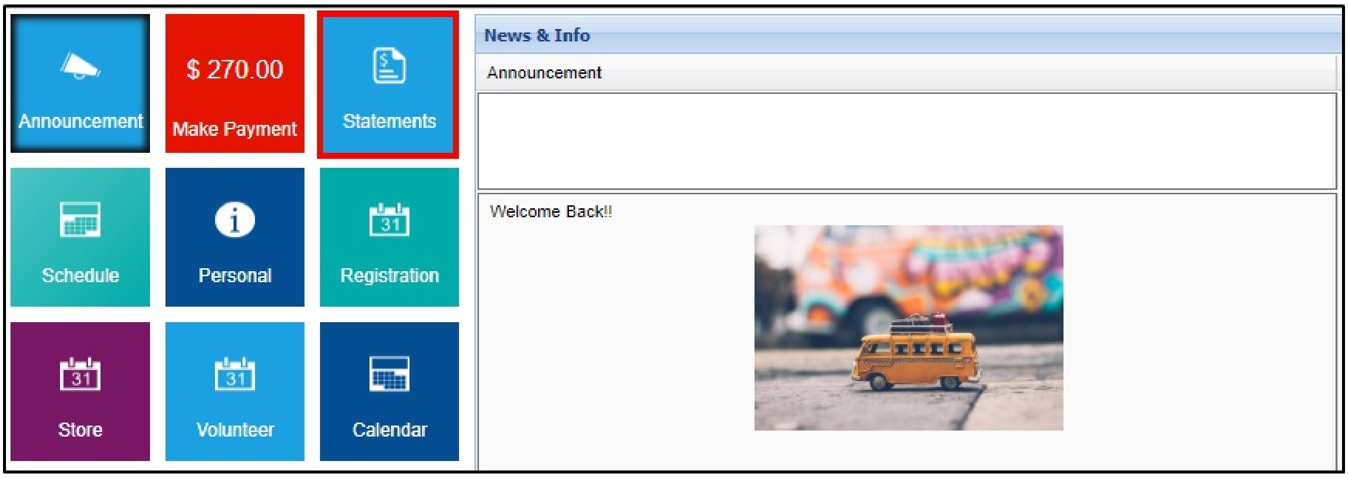
Last Modified on 10/26/2018 3:09 pm EDT

Parents can select the Statement tile to pull current and user defined period statements. This is also where users can pull year-end tax statements based off what has been paid through the system.

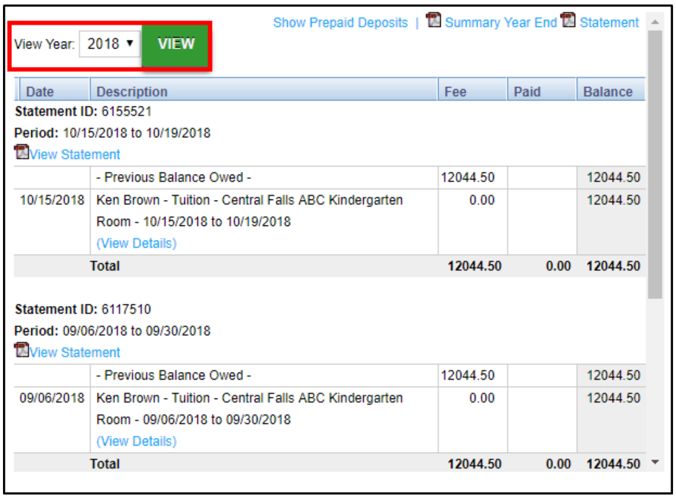
This tile will display current charges, credits, payment, or refunds on the family's ledger.

View Statements

1. From the home screen of the parent portal, click Statements

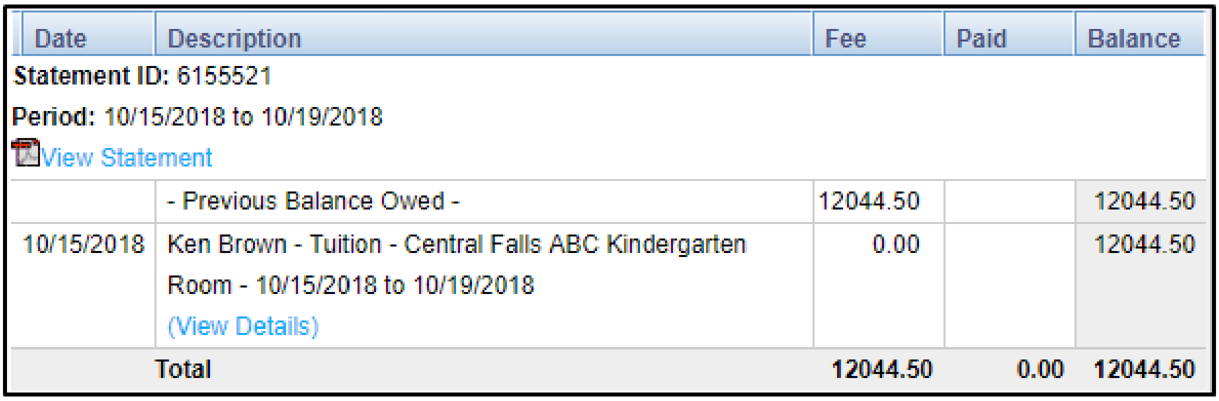


2. The current year will automatically be selected and the current statement will be displayed. To choose a different year, use the drop-down to select, then click View



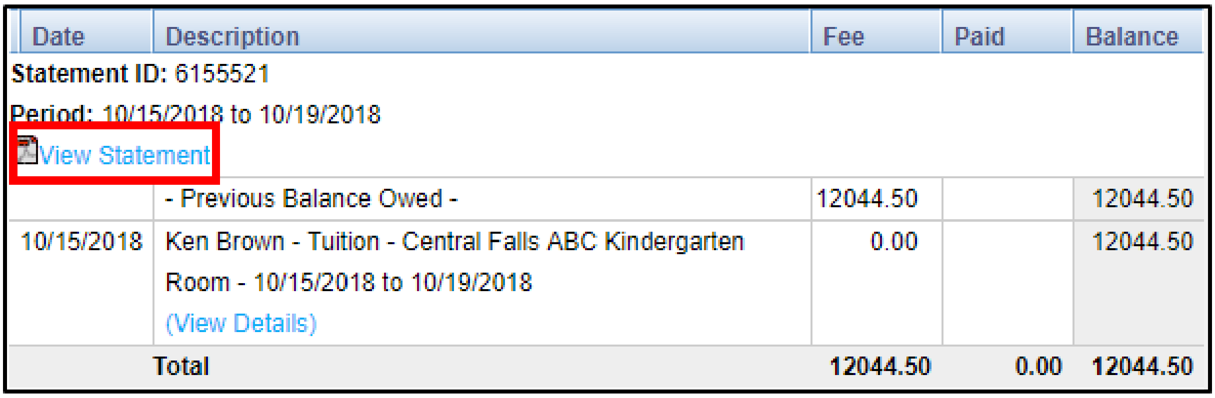
Date	Description	Fee	Paid	Balance
Statement ID: 6155521 **Period:** 10/15/2018 to 10/19/2018 View Statement				
	- Previous Balance Owed -	12044.50		12044.50
10/15/2018	Ken Brown - Tuition - Central Falls ABC Kindergarten Room - 10/15/2018 to 10/19/2018 (View Details)	0.00		12044.50
	Total	**12044.50**	**0.00**	**12044.50**
Statement ID: 6117510 **Period:** 09/06/2018 to 09/30/2018 View Statement				
	- Previous Balance Owed -	12044.50		12044.50
09/06/2018	Ken Brown - Tuition - Central Falls ABC Kindergarten Room - 09/06/2018 to 09/30/2018 (View Details)	0.00		12044.50
	Total	**12044.50**	**0.00**	**12044.50**

3. The statement view will display the statement ID, date, description, fee, paid, and balance



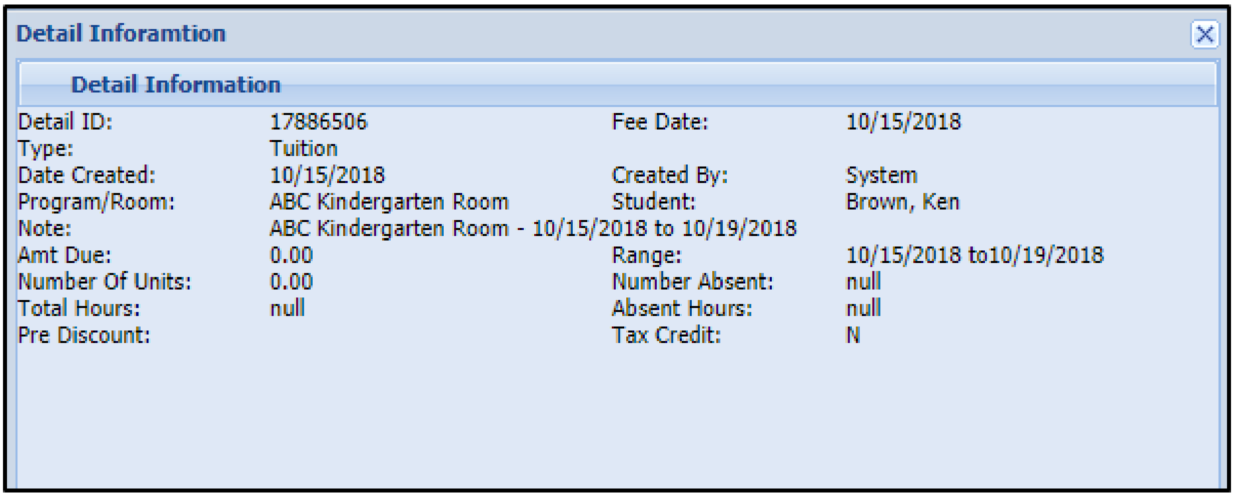
Date	Description	Fee	Paid	Balance
Statement ID: 6155521				
Period: 10/15/2018 to 10/19/2018				
View Statement				
	- Previous Balance Owed -	12044.50		12044.50
10/15/2018	Ken Brown - Tuition - Central Falls ABC Kindergarten Room - 10/15/2018 to 10/19/2018 (View Details)	0.00		12044.50
	Total	**12044.50**	**0.00**	**12044.50**

4. To open the full statement in PDF format, click View Statement



Date	Description	Fee	Paid	Balance
Statement ID: 6155521				
Period: 10/15/2018 to 10/19/2018				
View Statement				
	- Previous Balance Owed -	12044.50		12044.50
10/15/2018	Ken Brown - Tuition - Central Falls ABC Kindergarten Room - 10/15/2018 to 10/19/2018 (View Details)	0.00		12044.50
	Total	**12044.50**	**0.00**	**12044.50**

5. To view additional information, click (View Details) in the statement description column



Detail Inforamtion

Detail Information

Detail ID:	17886506	Fee Date:	10/15/2018
Type:	Tuition		
Date Created:	10/15/2018	Created By:	System
Program/Room:	ABC Kindergarten Room	Student:	Brown, Ken
Note:	ABC Kindergarten Room - 10/15/2018 to 10/19/2018		
Amt Due:	0.00	Range:	10/15/2018 to10/19/2018
Number Of Units:	0.00	Number Absent:	null
Total Hours:	null	Absent Hours:	null
Pre Discount:		Tax Credit:	N

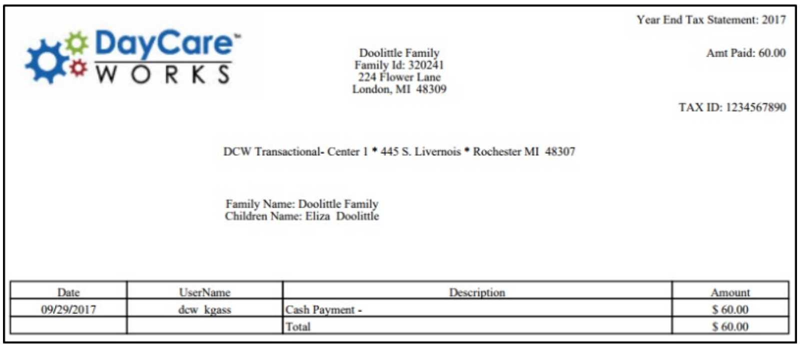
Other Options

There are three additional statement options at the top of the Statement screen:

- Show Prepaid Deposits - a popup will appear and display student, program, amount, begin/end date, and status of prepaid funds that have been added to the family's account
- Summary Year End - this option will option will open the year end summary in a

PDF

- Example of year end statement:



DayCare WORKS

Year End Tax Statement: 2017

Doolittle Family
Family Id: 320241
224 Flower Lane
London, MI 48309

Amt Paid: 60.00

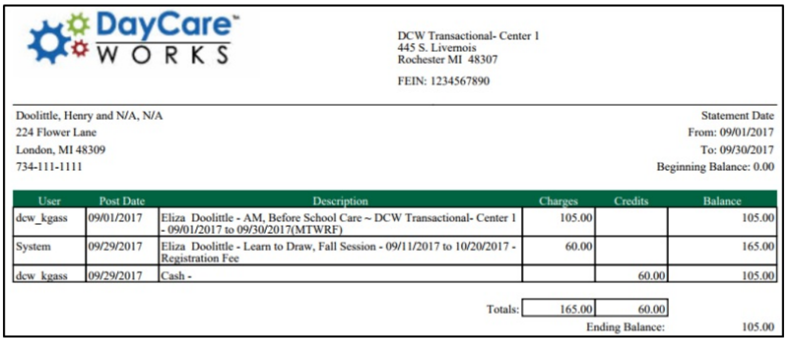
TAX ID: 1234567890

DCW Transactional- Center 1 • 445 S. Livernois • Rochester MI 48307

Family Name: Doolittle Family
Children Name: Eliza Doolittle

Date	UserName	Description	Amount
09/29/2017	dcw kgass	Cash Payment -	$ 60.00
		Total	$ 60.00

- Statement - this option allows statements to be pulled for a defined date range and opened in Excel or PDF. This statement can be printed if needed
  - Example of statement:



DayCare WORKS

DCW Transactional- Center 1
445 S. Livernois
Rochester MI 48307

FEIN: 1234567890

Doolittle, Henry and N/A, N/A
224 Flower Lane
London, MI 48309
734-111-1111

Statement Date
From: 09/01/2017
To: 09/30/2017
Beginning Balance: 0.00

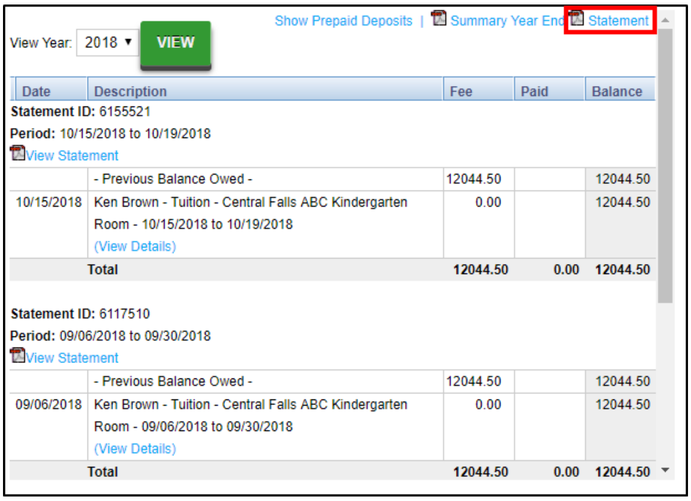
User	Post Date	Description	Charges	Credits	Balance
dcw_kgass	09/01/2017	Eliza Doolittle - AM, Before School Care ~ DCW Transactional- Center 1 - 09/01/2017 to 09/30/2017(MTWRF)	105.00		105.00
System	09/29/2017	Eliza Doolittle - Learn to Draw, Fall Session - 09/11/2017 to 10/20/2017 - Registration Fee	60.00		165.00
dcw_kgass	09/29/2017	Cash -		60.00	105.00
		Totals:	165.00	60.00	
				Ending Balance:	105.00

Parent Portal Statements - Printing Statements

Last Modified on 11/02/2018 1:37 pm EDT

Families can create and print financial statements for any date. This allows parents the ability to view a monthly billing statement or view an entire year's billing statement.

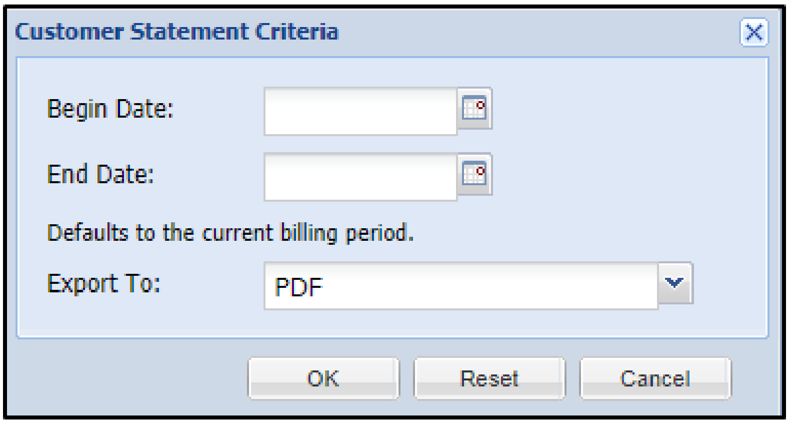
1. From the home screen, click the Statements tile
2. Click Statement



View Year: 2018

Date	Description	Fee	Paid	Balance
Statement ID: 6155521 **Period:** 10/15/2018 to 10/19/2018 View Statement				
	- Previous Balance Owed -	12044.50		12044.50
10/15/2018	Ken Brown - Tuition - Central Falls ABC Kindergarten Room - 10/15/2018 to 10/19/2018 (View Details)	0.00		12044.50
	Total	**12044.50**	**0.00**	**12044.50**
Statement ID: 6117510 **Period:** 09/06/2018 to 09/30/2018 View Statement				
	- Previous Balance Owed -	12044.50		12044.50
09/06/2018	Ken Brown - Tuition - Central Falls ABC Kindergarten Room - 09/06/2018 to 09/30/2018 (View Details)	0.00		12044.50
	Total	**12044.50**	**0.00**	**12044.50**

3. Enter the begin and end dates to pull a statement for. Then select PDF or Excel



Customer Statement Criteria

Begin Date:

End Date:

Defaults to the current billing period.

Export To: PDF

4. Click OK
5. A statement will be created for the date range requested in the format requested (PDF or Excel)

Parent Portal - Attendance

Last Modified on 12/04/2018 10:03 am EST

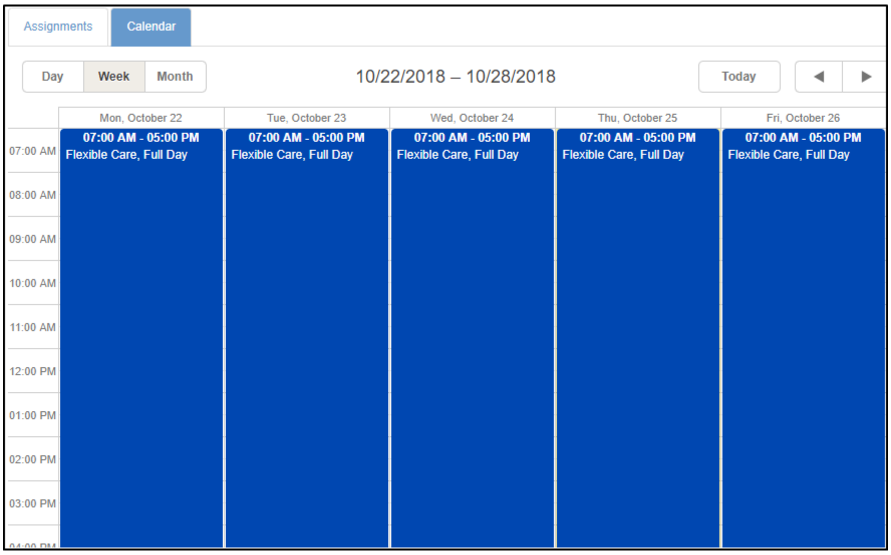
The Schedule tile will display the student's schedule, actual attendance, and allow parents to select days from a parent managed calendar , (if applicable).

Calendar Tab

The student’s schedule will display below the calendar. If the center allows parents to make changes to scheduled days, or submit a Schedule Change Request , they can double click on a day from the calendar and submit a change request for center approval.

Change Request

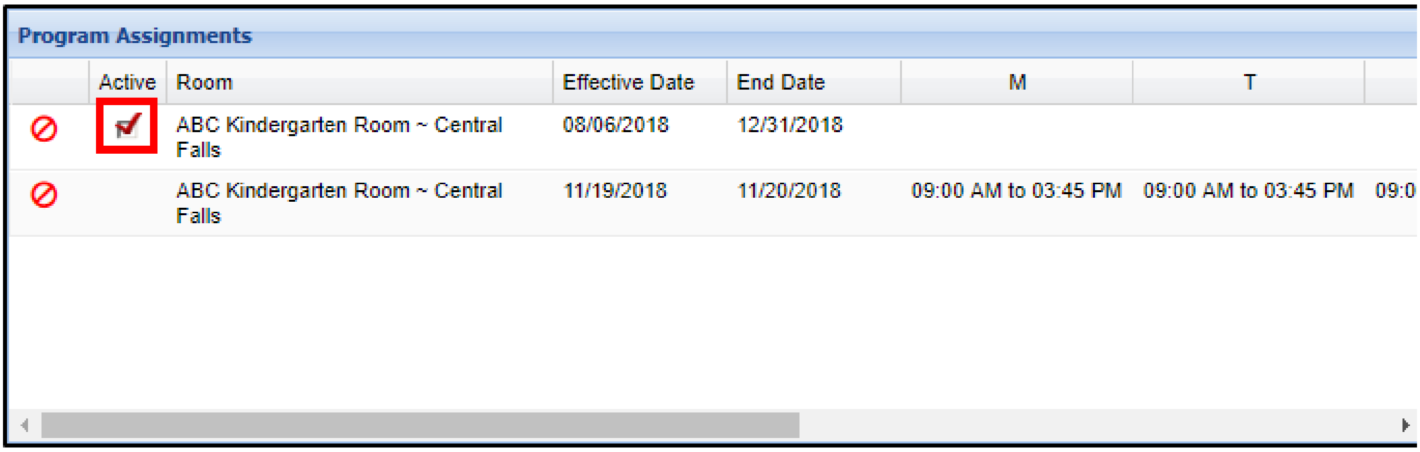
1. From the Calendar tab, double click a day



2. The New Schedule Change Request will display
    - Choose the correct student(s)
    - Select the time period (date and time)
    - Enter any notes
3. Click Save
4. Schedule changes must be approved by the center

Assignments Tab

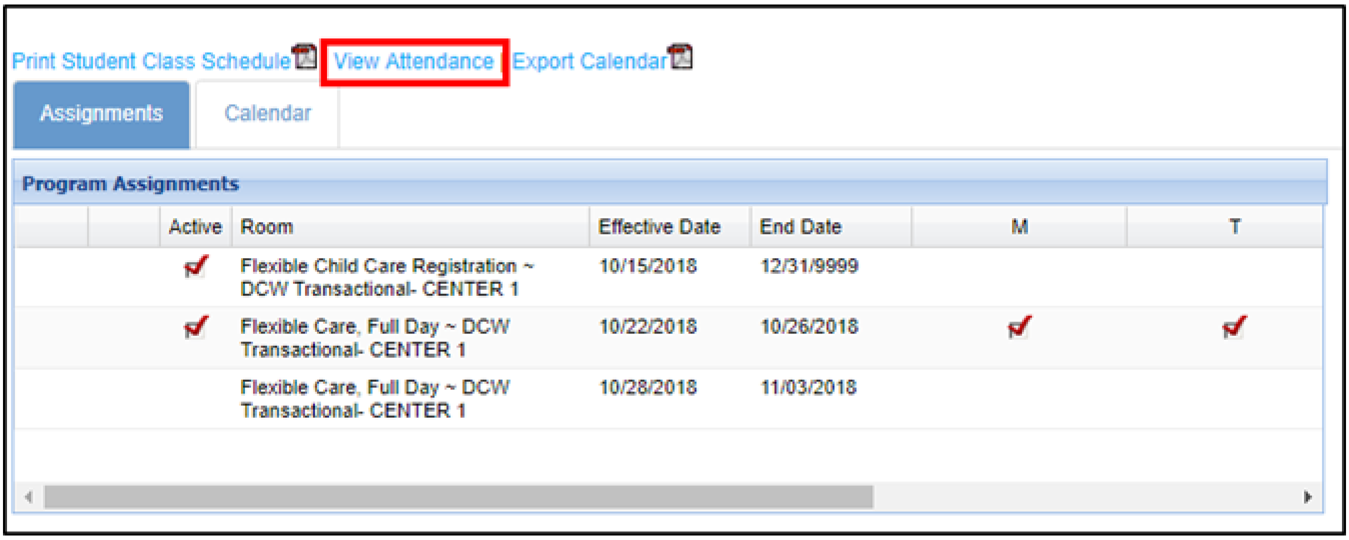
The Assignments tab will display scheduled programs for the present and future. The current or active program/schedule will have a check mark under the Active column.


Program Assignments

	Active	Room	Effective Date	End Date	M	T	
⊘	✓	ABC Kindergarten Room ~ Central Falls	08/06/2018	12/31/2018			
⊘		ABC Kindergarten Room ~ Central Falls	11/19/2018	11/20/2018	09:00 AM to 03:45 PM	09:00 AM to 03:45 PM	09:0

Additional Assignments Page Options

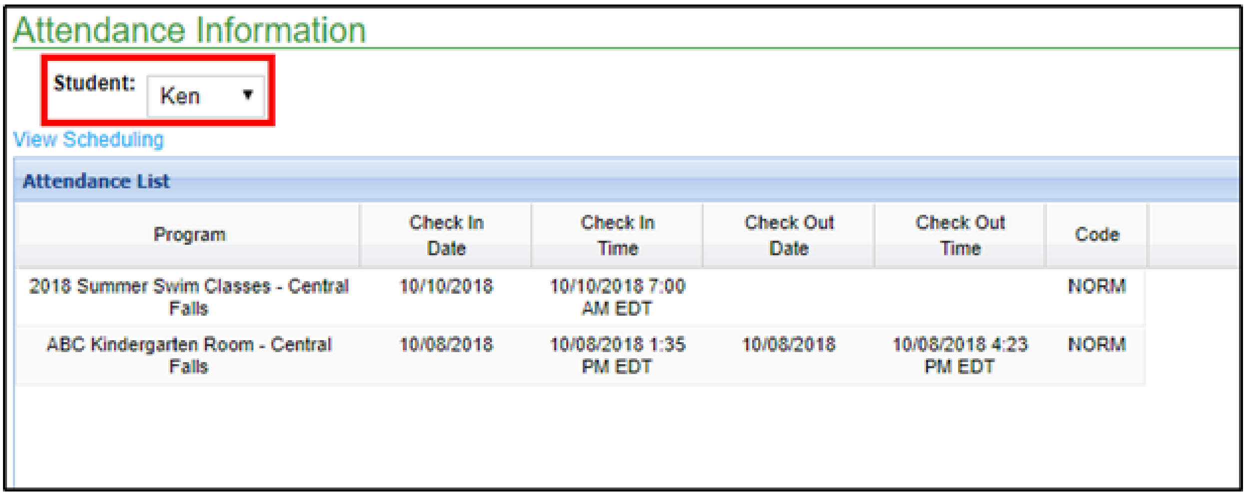
- Update or delete a student's schedule, if the center has the options enabled
- Pull the following documents from this screen, click the links below to see examples. **Please Note**: For administrators to turn on these settings, they must navigate to Setup Roles (Activity ID 1228 for printing schedules and 1235 to export calendar)
    - Print Student Class Schedule
    - Export Calendar
- View the student's attendance summary by clicking View Attendance



Program Assignments

		Active	Room	Effective Date	End Date	M	T
		✓	Flexible Child Care Registration ~ DCW Transactional- CENTER 1	10/15/2018	12/31/9999		
		✓	Flexible Care, Full Day ~ DCW Transactional- CENTER 1	10/22/2018	10/26/2018	✓	✓
			Flexible Care, Full Day ~ DCW Transactional- CENTER 1	10/28/2018	11/03/2018		

    - On the Attendance Information screen, choose the student to view using the drop-down list



Attendance Information

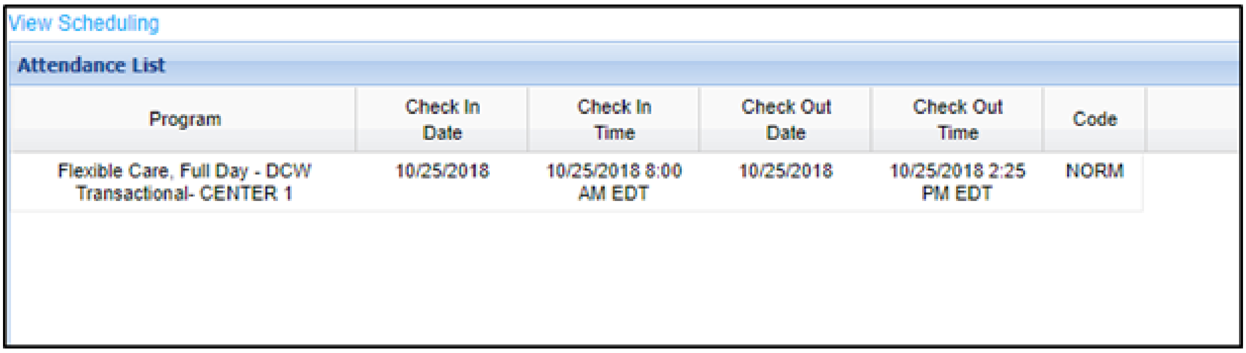
Student: Ken

View Scheduling

Attendance List

Program	Check In Date	Check In Time	Check Out Date	Check Out Time	Code
2018 Summer Swim Classes - Central Falls	10/10/2018	10/10/2018 7:00 AM EDT			NORM
ABC Kindergarten Room - Central Falls	10/08/2018	10/08/2018 1:35 PM EDT	10/08/2018	10/08/2018 4:23 PM EDT	NORM

- Attendance detail for that student will display



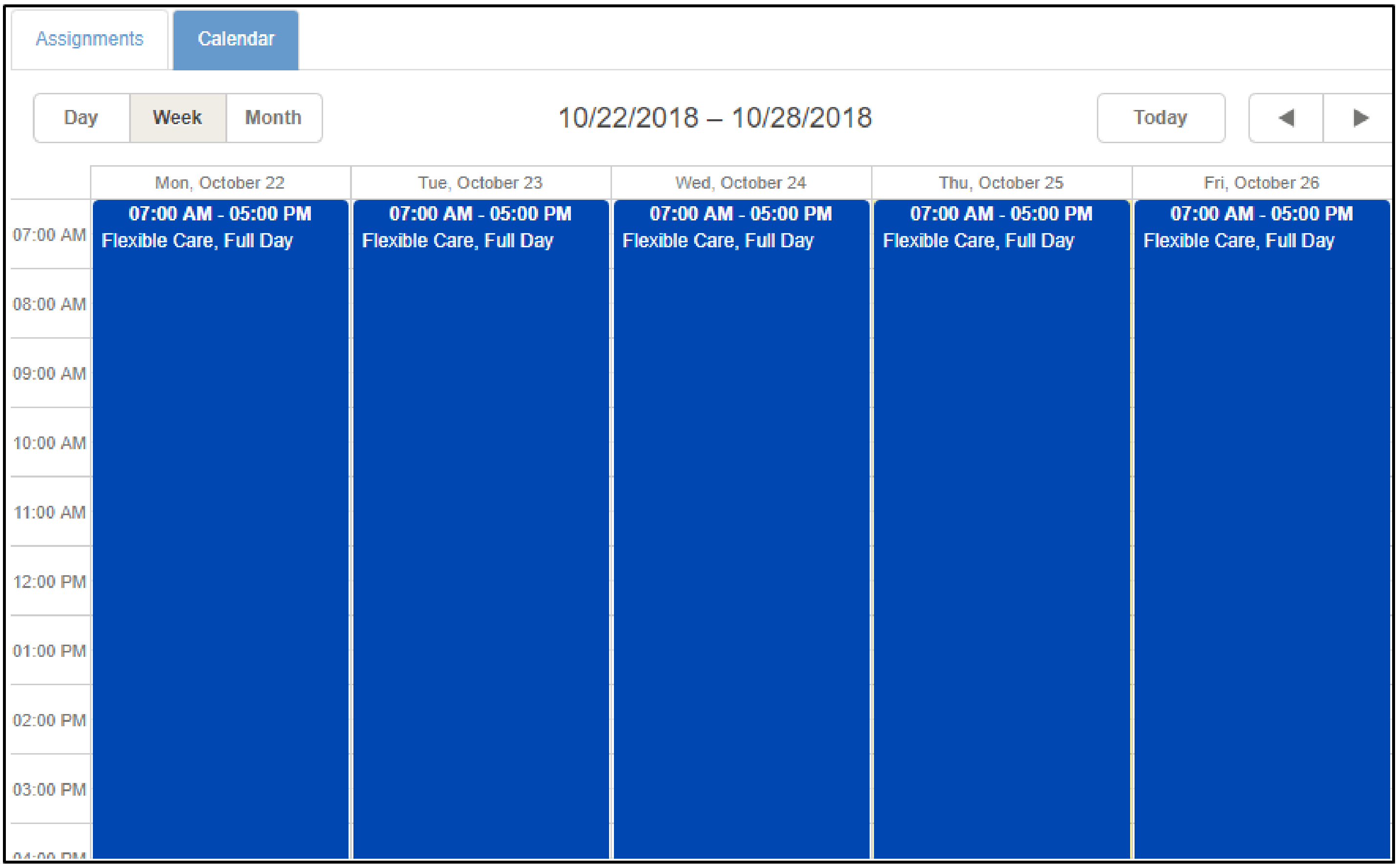
View Scheduling

Attendance List

Program	Check In Date	Check In Time	Check Out Date	Check Out Time	Code
Flexible Care, Full Day - DCW Transactional- CENTER 1	10/25/2018	10/25/2018 8:00 AM EDT	10/25/2018	10/25/2018 2:25 PM EDT	NORM

The Schedule tile will display a student's schedule, allow a parent to select days from a parent managed calendar and display actual attendance.

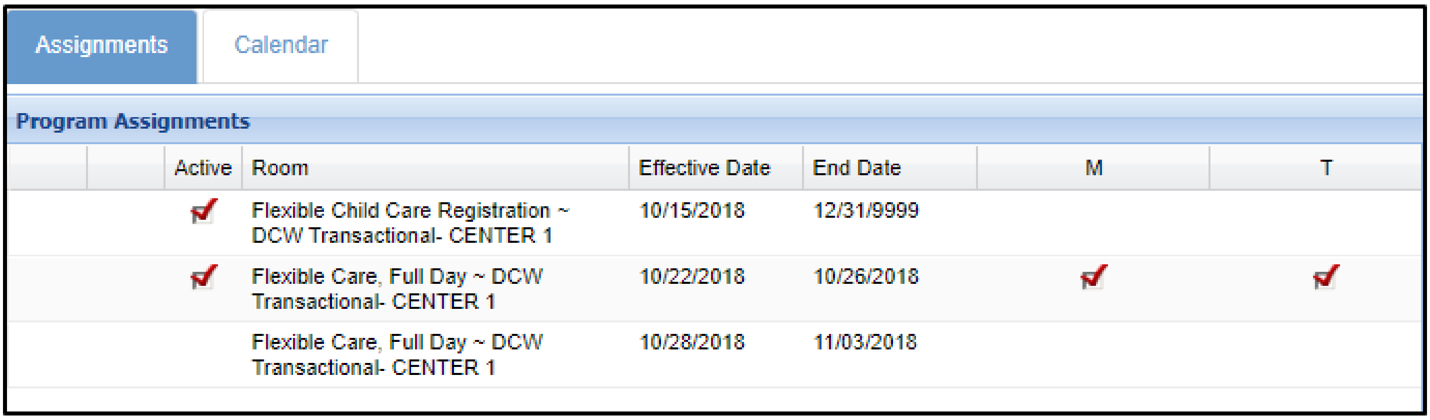
Below the calendar, the student's schedule will display. If the center allows parents to make changed to scheduled days, they can double click on an assignment and submit a change request for center approval.



10/22/2018 – 10/28/2018

	Mon, October 22	Tue, October 23	Wed, October 24	Thu, October 25	Fri, October 26
07:00 AM	07:00 AM - 05:00 PM Flexible Care, Full Day	07:00 AM - 05:00 PM Flexible Care, Full Day	07:00 AM - 05:00 PM Flexible Care, Full Day	07:00 AM - 05:00 PM Flexible Care, Full Day	07:00 AM - 05:00 PM Flexible Care, Full Day
08:00 AM					
09:00 AM					
10:00 AM					
11:00 AM					
12:00 PM					
01:00 PM					
02:00 PM					
03:00 PM					

The Assignments tab will display scheduled programs for the present and future.



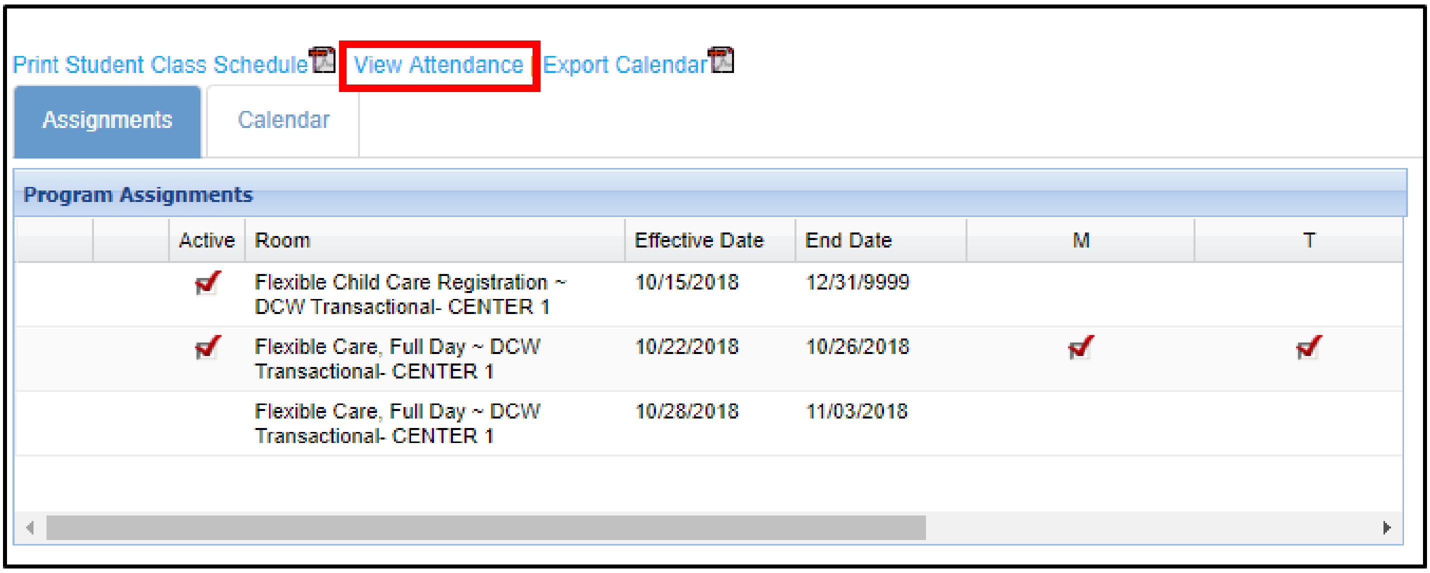
Program Assignments

		Active	Room	Effective Date	End Date	M	T
		✓	Flexible Child Care Registration ~ DCW Transactional- CENTER 1	10/15/2018	12/31/9999		
		✓	Flexible Care, Full Day ~ DCW Transactional- CENTER 1	10/22/2018	10/26/2018	✓	✓
			Flexible Care, Full Day ~ DCW Transactional- CENTER 1	10/28/2018	11/03/2018		

On this page, parents can also pull documents, click on the below links to see examples!

- Print Student Class Schedule
- Export Calendar

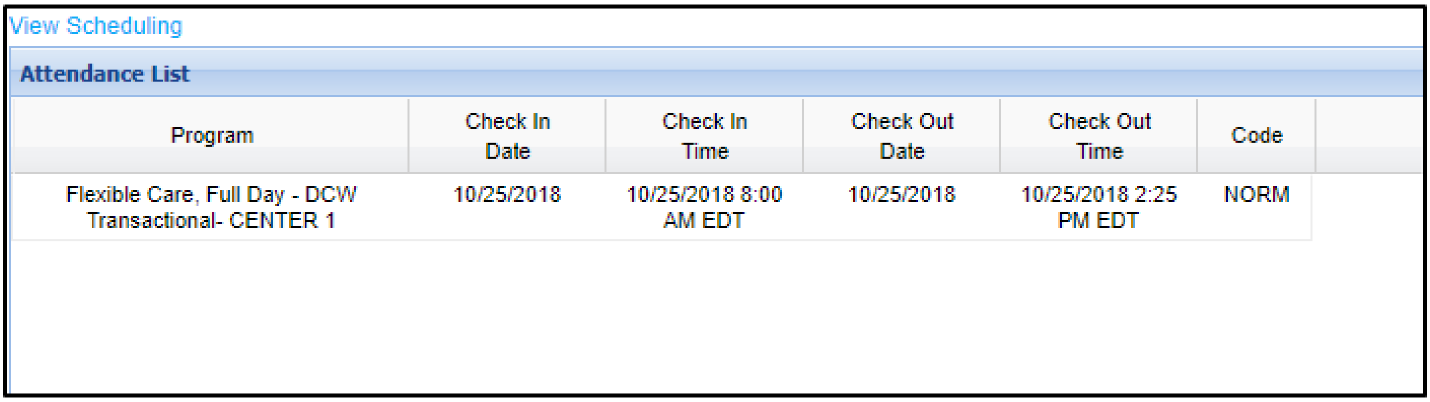
If the parent wants to see a summary of their student's attendance, they can select the View Attendance button



Program Assignments

		Active	Room	Effective Date	End Date	M	T
		✓	Flexible Child Care Registration ~ DCW Transactional- CENTER 1	10/15/2018	12/31/9999		
		✓	Flexible Care, Full Day ~ DCW Transactional- CENTER 1	10/22/2018	10/26/2018	✓	✓
			Flexible Care, Full Day ~ DCW Transactional- CENTER 1	10/28/2018	11/03/2018		

On the Attendance Information screen, choose the student to view using the drop-down list. Attendance detail for that student will display



Attendance List

Program	Check In Date	Check In Time	Check Out Date	Check Out Time	Code
Flexible Care, Full Day - DCW Transactional- CENTER 1	10/25/2018	10/25/2018 8:00 AM EDT	10/25/2018	10/25/2018 2:25 PM EDT	NORM

To go back to the schedule tab, select the View Scheduling link

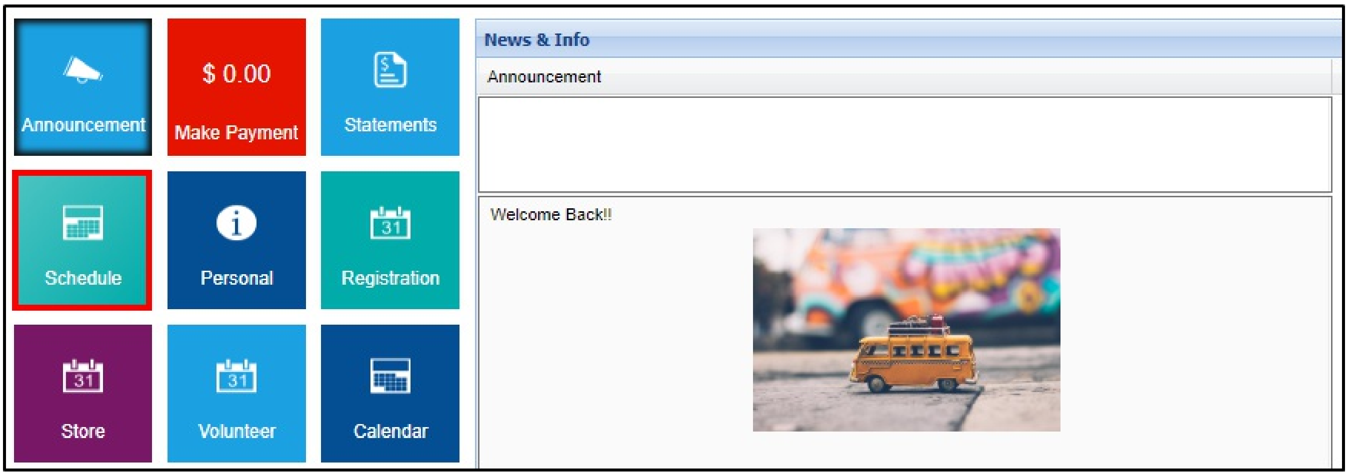
Parent Portal - Room Change or Cancellation Request

Last Modified on 10/25/2018 12:55 pm EDT

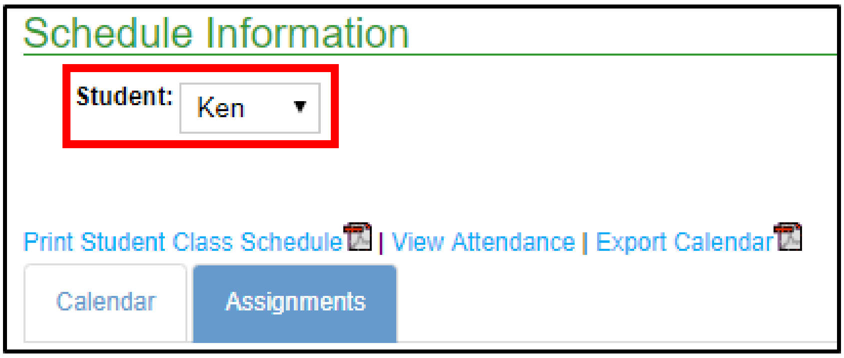
From the parent portal, parents have the ability to request a schedule cancellation or schedule change.

Deleting a Schedule

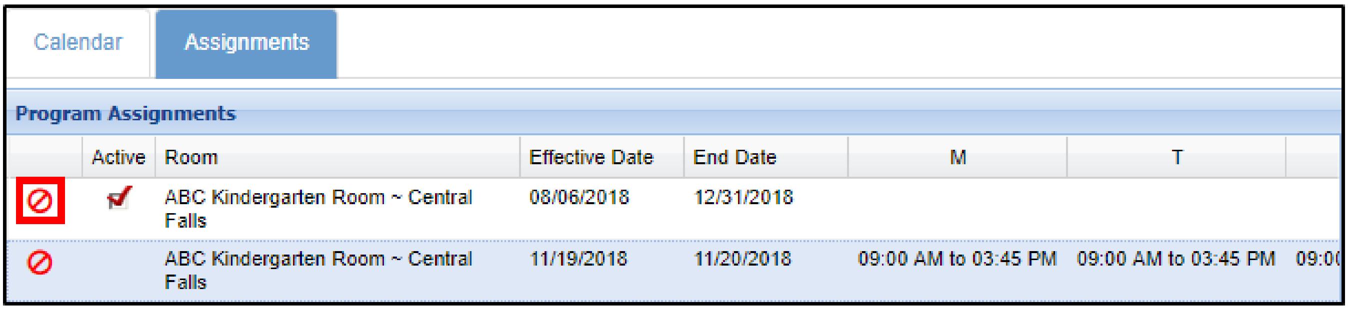
1. From the home screen of the parent portal, click the Schedule/Attendance



2. Select the student's name from the drop-down, if applicable

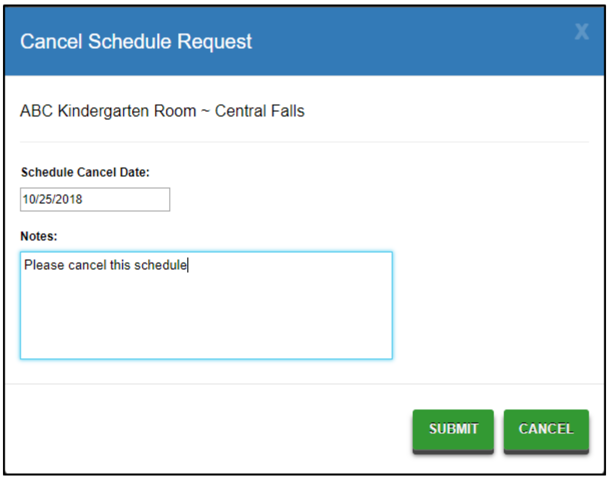


3. To delete a schedule, click the delete icon



	Active	Room	Effective Date	End Date	M	T	
⊘	✓	ABC Kindergarten Room ~ Central Falls	08/06/2018	12/31/2018			
⊘		ABC Kindergarten Room ~ Central Falls	11/19/2018	11/20/2018	09:00 AM to 03:45 PM	09:00 AM to 03:45 PM	09:0

4. Select the Schedule Cancel Date and enter any Notes



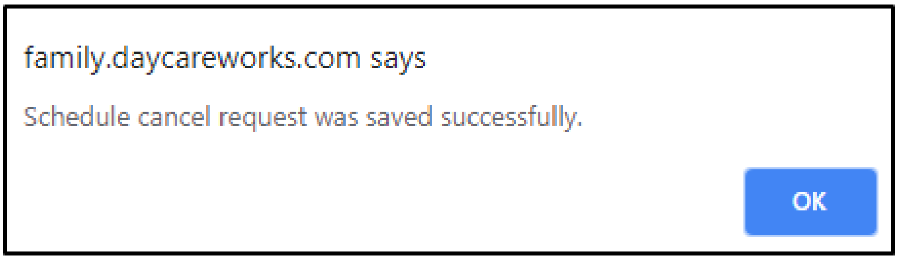
Cancel Schedule Request

ABC Kindergarten Room ~ Central Falls

Schedule Cancel Date: 10/25/2018

Notes: Please cancel this schedule

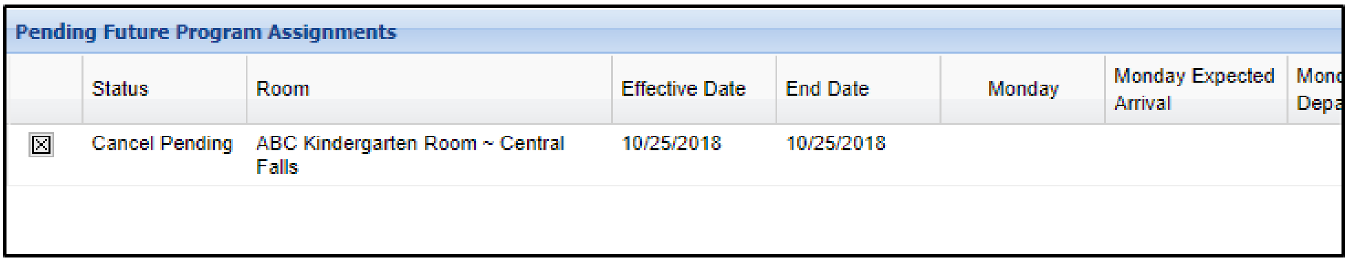
5. Click Submit
6. Click OK on the confirmation popup



family.daycareworks.com says

Schedule cancel request was saved successfully.

7. The cancellation request will move to the Pending Future Program Assignments section

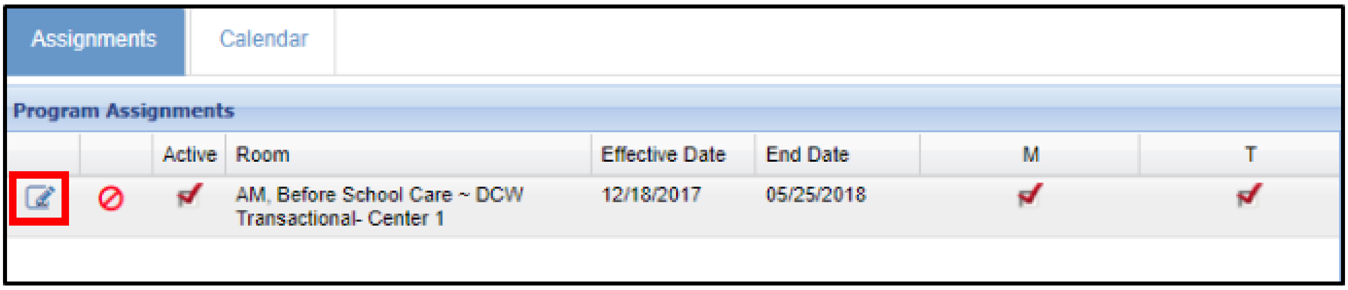


Pending Future Program Assignments

	Status	Room	Effective Date	End Date	Monday	Monday Expected Arrival	Mond Depa
☒	Cancel Pending	ABC Kindergarten Room ~ Central Falls	10/25/2018	10/25/2018			

Updating a Schedule

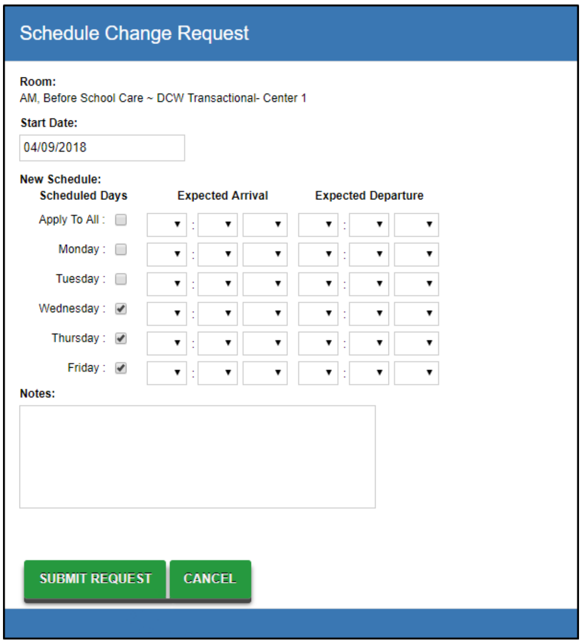
1. Click the edit icon next to the program/room assignment



Program Assignments

		Active	Room	Effective Date	End Date	M	T
✎	⊘	✓	AM, Before School Care ~ DCW Transactional- Center 1	12/18/2017	05/25/2018	✓	✓

2. Enter the Start Date, days, and times of the new schedule and enter any necessary notes



Schedule Change Request

Room:
AM, Before School Care ~ DCW Transactional- Center 1

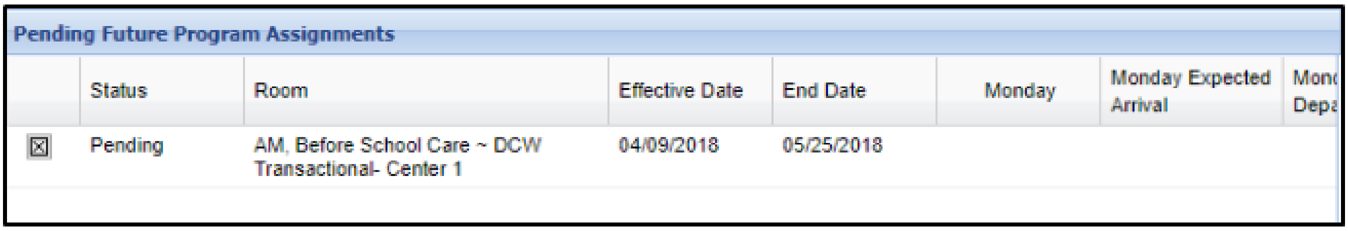
Start Date:
04/09/2018

New Schedule:

Scheduled Days	Expected Arrival	Expected Departure
Apply To All : ☐		
Monday : ☐		
Tuesday : ☐		
Wednesday : ☑		
Thursday : ☑		
Friday : ☑		

Notes:

3. Click Submit Request
4. Once the request is submitted, it will display in the Pending Future Program Assignments section. After the schedule change has been approved, it will then be located under the Program Assignments section



Pending Future Program Assignments

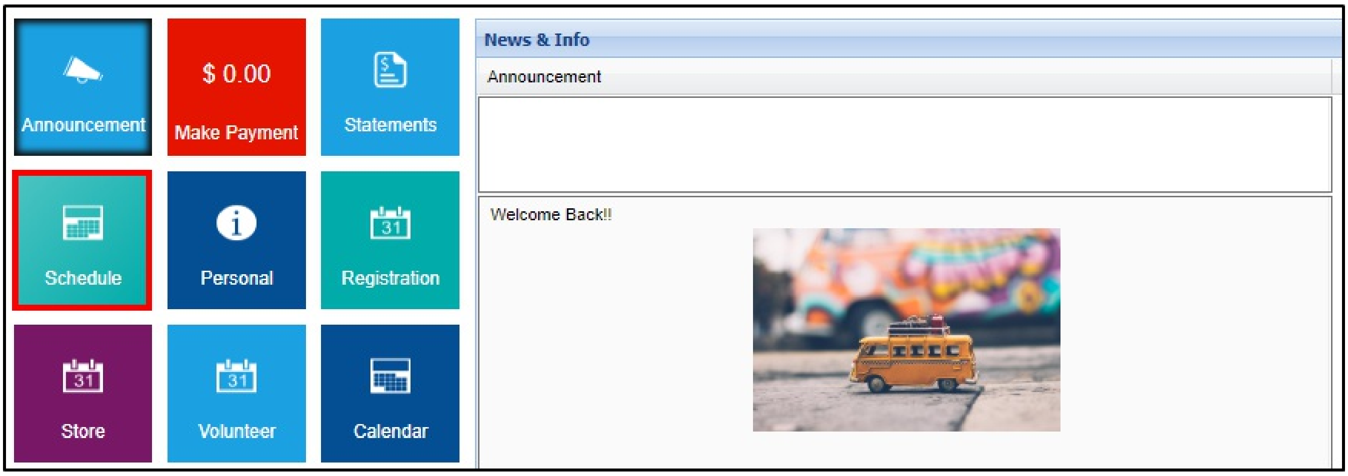
	Status	Room	Effective Date	End Date	Monday	Monday Expected Arrival	Mon Depa
☒	Pending	AM, Before School Care ~ DCW Transactional- Center 1	04/09/2018	05/25/2018			

Parent Portal - Selecting Days from a Parent Managed Calendar

Last Modified on 11/02/2018 12:58 pm EDT

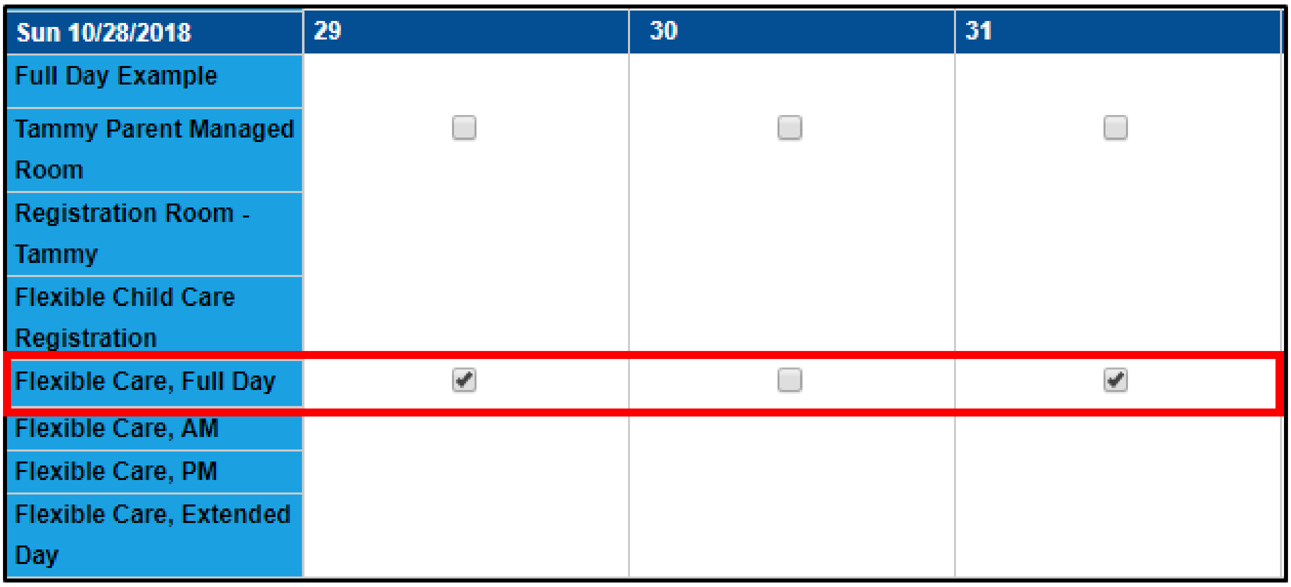
If a student is registered into a Parent Managed room, the parents can select the days their student will attend from a calendar. Follow the steps below:

1. Click the Schedule/Attendance tile from the home screen of the parent portal



Welcome Back!!

2. Select the available day(s) from the parent managed calendar



Sun 10/28/2018	29	30	31
Full Day Example			
Tammy Parent Managed Room	☐	☐	☐
Registration Room - Tammy			
Flexible Child Care Registration			
Flexible Care, Full Day	☑	☐	☑
Flexible Care, AM			
Flexible Care, PM			
Flexible Care, Extended Day			

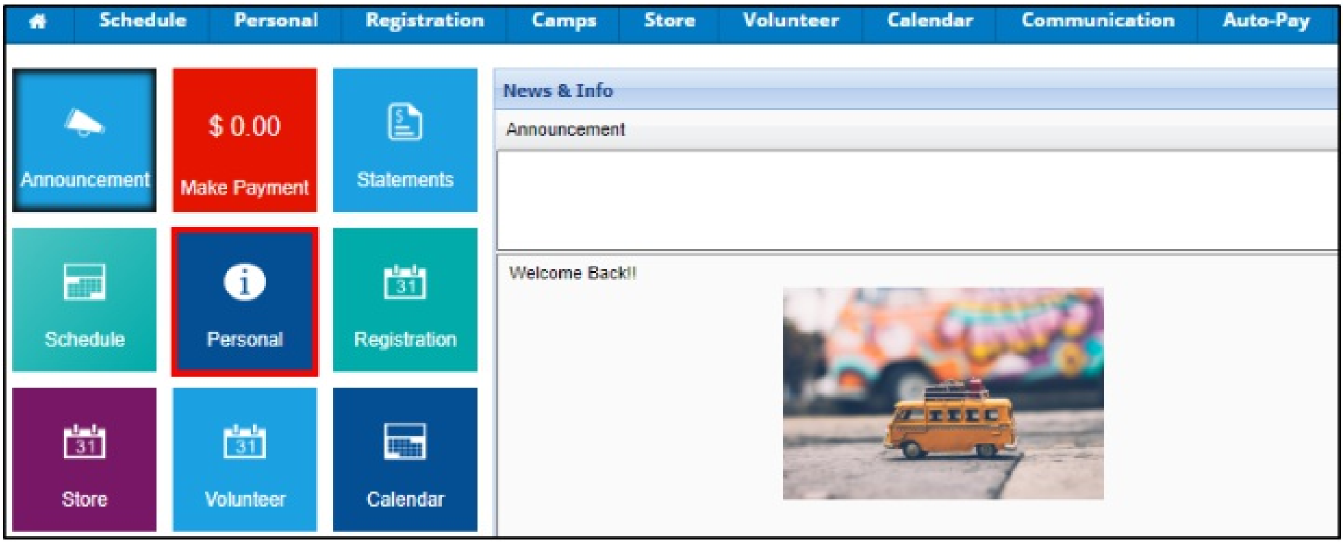
3. Click Save below the calendar
4. The Enrollment(s) screen will display with the Cart Total and Total Due On Checkout (if applicable)

Parent Portal - Requesting Vacation Days

Last Modified on 10/25/2018 11:41 am EDT

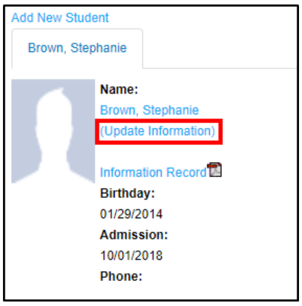
Parents can request vacation days via the Parent Portal. Please follow the steps below to request vacation days:

1. To request vacation days for student, click the Personal tile from the portal home screen



Welcome Back!!

2. Then select Update information, just below the student's name



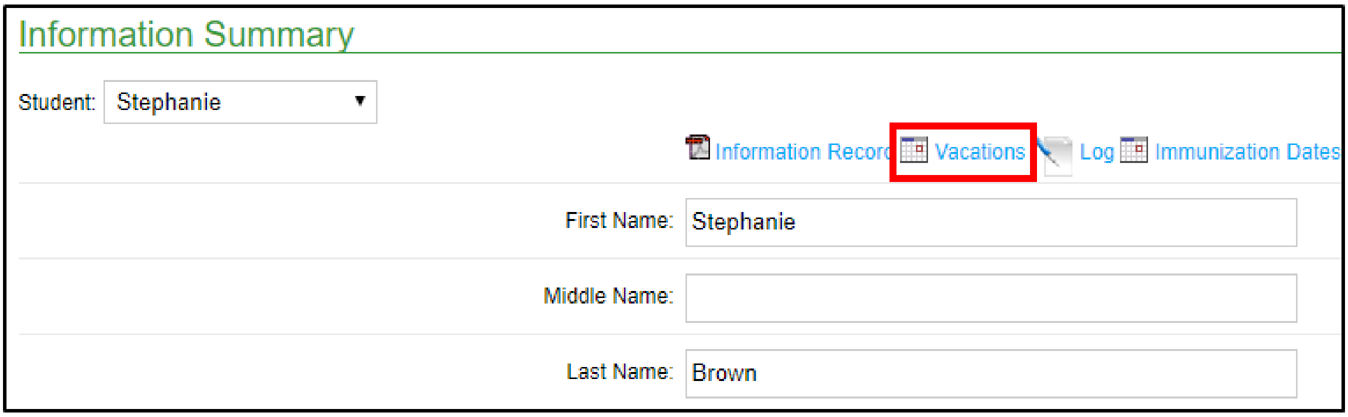
Name: Brown, Stephanie

Birthday: 01/29/2014

Admission: 10/01/2018

Phone:

3. Then click Vacations



Information Summary

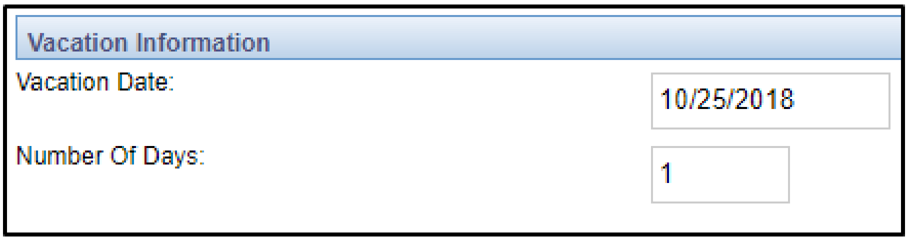
Student: Stephanie

First Name: Stephanie

Middle Name:

Last Name: Brown

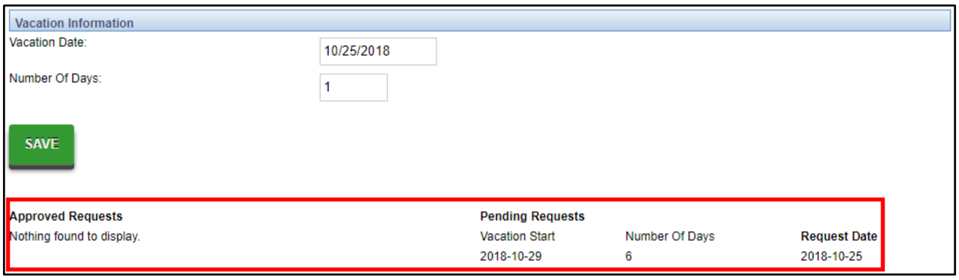
4. Enter the vacation start date, then enter the number of days being requested



Vacation Date: 10/25/2018

Number Of Days: 1

5. Click Save
6. The vacation request will move to the Pending Requests section until it is approved. Once approved, it will move to the Approved Requests section



Vacation Date: 10/25/2018

Number Of Days: 1

Approved Requests

Nothing found to display.

Pending Requests

Vacation Start	Number Of Days	Request Date
2018-10-29	6	2018-10-25

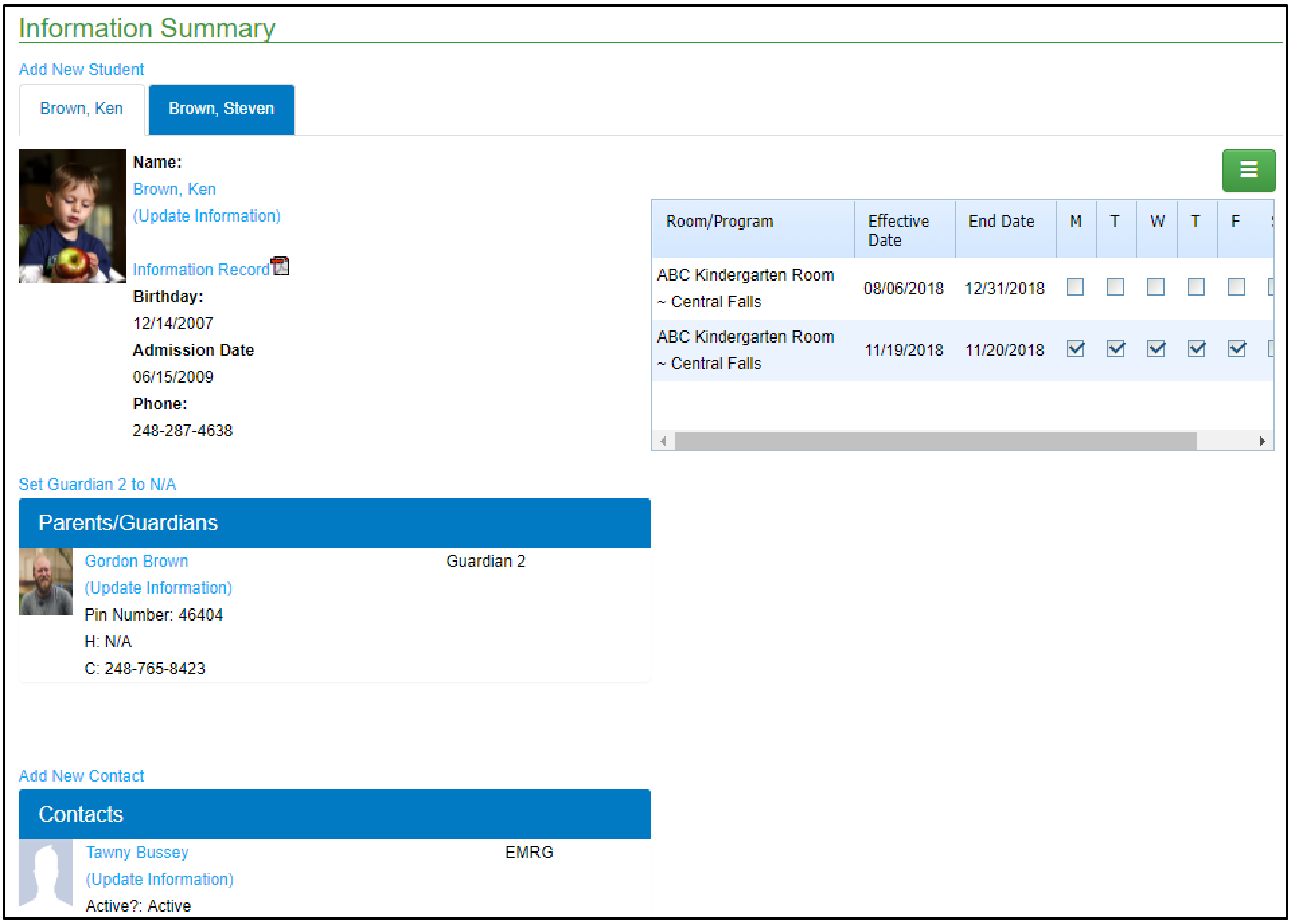
Please Note: Once vacation requests are submitted, they will need to be approved from the admin site. Click here for instructions on approving/rejecting vacation requests.

Parent Portal - Personal

Last Modified on 12/04/2018 10:00 am EST

The Personal tile allows parents to add new students to a center or view/update personal information for students, parents/guardians, or other contacts.

Key Point: Displayed parent contact and child information is based on what is set up in the family portal not allowed rule, DCW- connect sub categories



Information Summary

Add New Student

Brown, Ken | Brown, Steven

Name:
Brown, Ken
(Update Information)

Information Record

Birthday:
12/14/2007

Admission Date
06/15/2009

Phone:
248-287-4638

Room/Program	Effective Date	End Date	M	T	W	T	F
ABC Kindergarten Room ~ Central Falls	08/06/2018	12/31/2018	☐	☐	☐	☐	☐
ABC Kindergarten Room ~ Central Falls	11/19/2018	11/20/2018	☑	☑	☑	☑	☑

Set Guardian 2 to N/A

Parents/Guardians

Gordon Brown — Guardian 2
(Update Information)
Pin Number: 46404
H: N/A
C: 248-765-8423

Add New Contact

Contacts

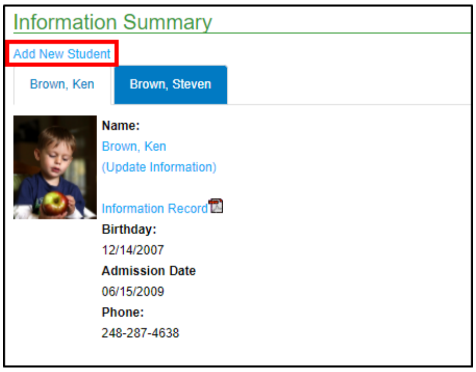
Tawny Bussey — EMRG
(Update Information)
Active?: Active

From this screen, parents also have the following options by clicking the green menu icon:

- Print Student Class Schedule (PDF)
- View Attendance
- Export Calendar (PDF)
- View Daily InSite

Add New Student

1. To add a new student to the family, click the Add New Student link



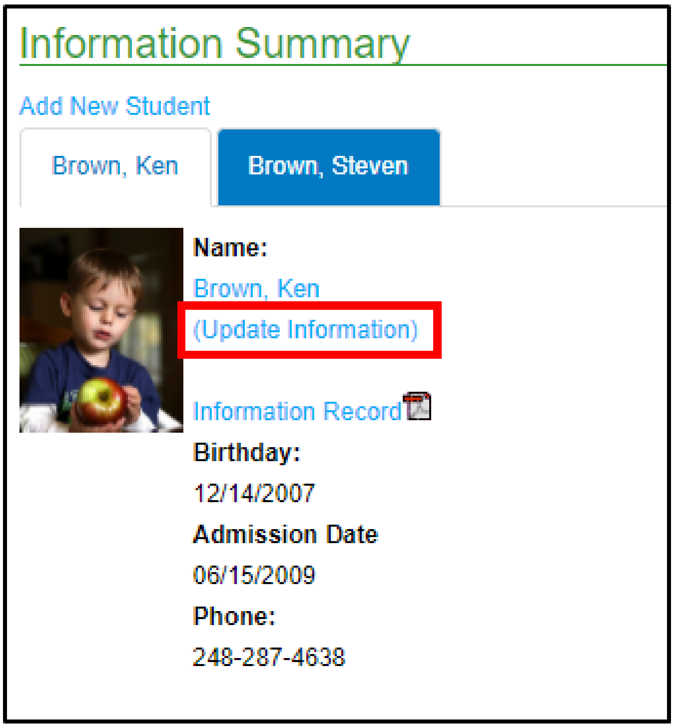
Name:
Brown, Ken
Birthday:
12/14/2007
Admission Date
06/15/2009
Phone:
248-287-4638

2. Complete the Information Summary form
3. Click Save. The information will be sent to the center for review and approval.
    - **Please Note**: Adding a student does not add the student to a specific program. Once the student is approved, they can be registered

Adding a child on this screen DOES NOT add the child to a specific program/class. Once the child is approved the parent will need to go in and register for a program or a center will need to add a program/room assignment for the child.

Update Information

1. Student, parent/guardian, and contact information can be updated via the Parent portal by clicking Update Information next to the person's name to update


Information Summary

Add New Student

Brown, Ken

Brown, Steven

Name:

Brown, Ken

(Update Information)

Information Record

Birthday:

12/14/2007

Admission Date

06/15/2009

Phone:

248-287-4638

2. Make all the necessary changes and click Save

Other Options on the Update screen include:

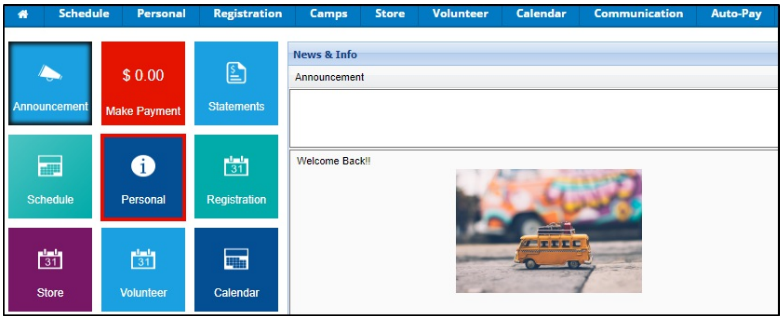
- The student's Information Record in PDF format. This can also be pulled from the Information Summary screen
- Vacations, if applicable
- Log - entries adding by administrators, teachers, or other staff
- Immunization Dates

Parent Portal - Adding Immunization Detail

Last Modified on 11/02/2018 1:11 pm EDT

To add or update immunization detail on the Parent Portal, follow the steps below:

1. From the portal home screen, Click Personal

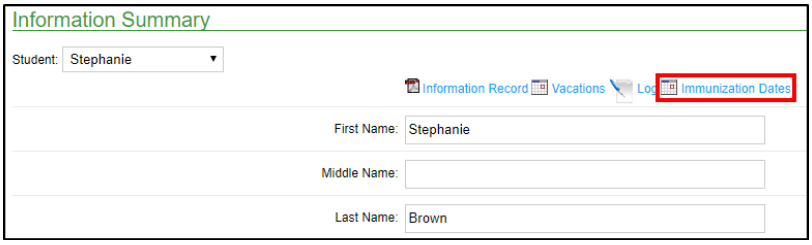


Welcome Back!!

2. Click the Update Information link under the student's name

Name:
Brown, Stephanie
Birthday:
01/29/2014
Admission:
10/01/2018
Phone:

3. Select the Immunization Dates link towards the top of the screen



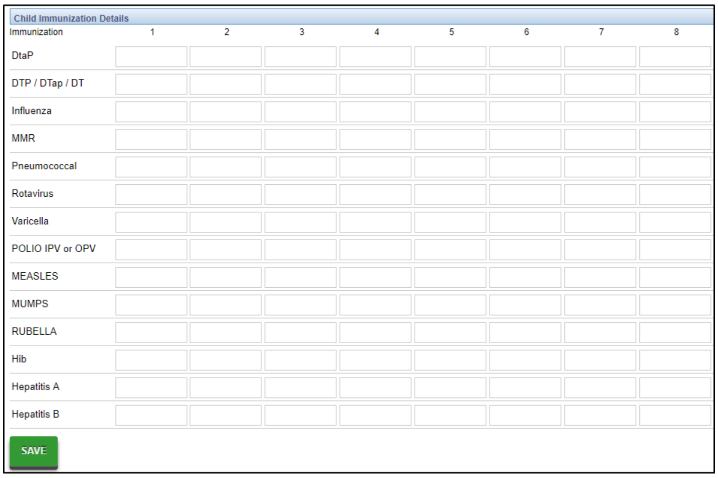
Student: Stephanie

First Name: Stephanie

Middle Name:

Last Name: Brown

4. Enter the date of each immunization within the Child Immunization Details chart



Child Immunization Details

Immunization	1	2	3	4	5	6	7	8
DtaP								
DTP / DTap / DT								
Influenza								
MMR								
Pneumococcal								
Rotavirus								
Varicella								
POLIO IPV or OPV								
MEASLES								
MUMPS								
RUBELLA								
Hib								
Hepatitis A								
Hepatitis B								

5. Once all necessary immunization dates are filled in, click Save just below the

chart

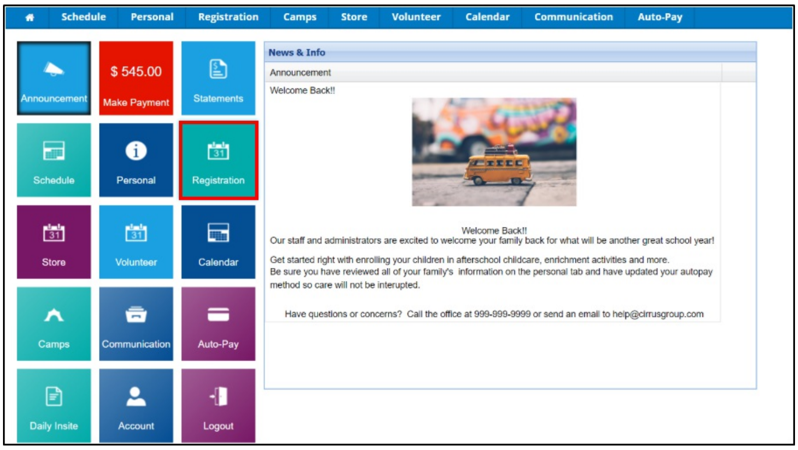
Parent Portal - Registering

Last Modified on 11/02/2018 1:26 pm EDT

The Registration screen is where parents can sign their students up for new programs; this may include yearly program registration, full day sign ups, enrichment programs, or summer options.

Administrators can manually approve registrations or approve students from the wait list.

1. Click the Registration tile from the home screen of the portal



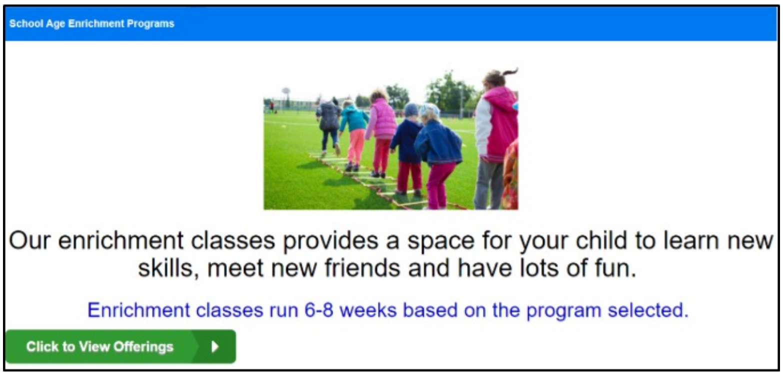
Welcome Back!!

Welcome Back!!
Our staff and administrators are excited to welcome your family back for what will be another great school year!

Get started right with enrolling your children in afterschool childcare, enrichment activities and more.
Be sure you have reviewed all of your family's information on the personal tab and have updated your autopay method so care will not be interupted.

Have questions or concerns? Call the office at 999-999-9999 or send an email to help@cirrusgroup.com

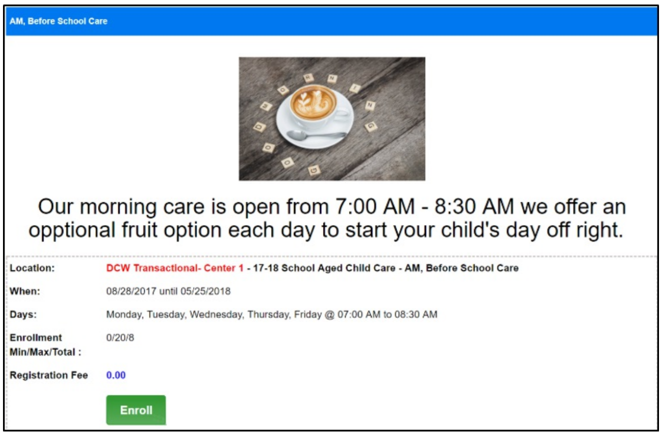
2. Locate the correct Category and select Click to View Offerings to view programs under that category



Our enrichment classes provides a space for your child to learn new skills, meet new friends and have lots of fun.

Enrichment classes run 6-8 weeks based on the program selected.

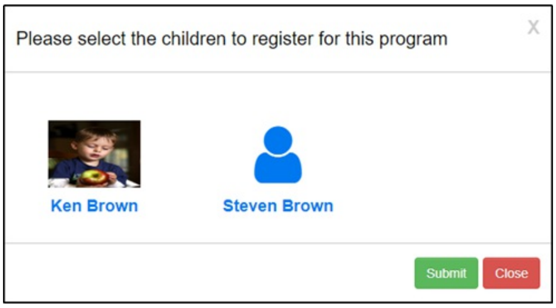
3. Review the program details and click Enroll



Our morning care is open from 7:00 AM - 8:30 AM we offer an opptional fruit option each day to start your child's day off right.

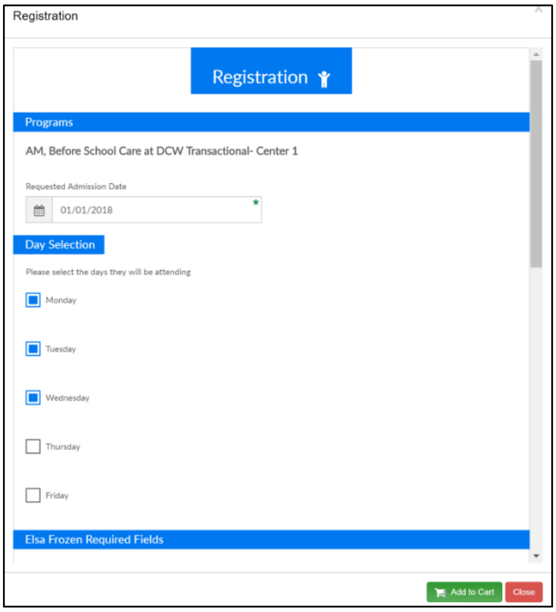
Location:	DCW Transactional- Center 1 - 17-18 School Aged Child Care - AM, Before School Care
When:	08/28/2017 until 05/25/2018
Days:	Monday, Tuesday, Wednesday, Thursday, Friday @ 07:00 AM to 08:30 AM
Enrollment Min/Max/Total :	0/20/8
Registration Fee	0.00

4. Select the student(s) to enroll and click Submit



Please select the children to register for this program

5. The registration form will display, complete required fields and click Add to Cart



AM, Before School Care at DCW Transactional- Center 1

Requested Admission Date: 01/01/2018

Please select the days they will be attending

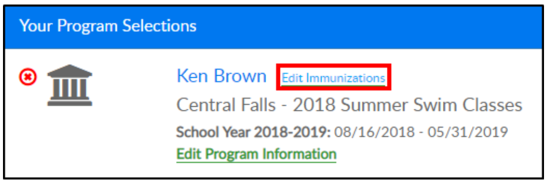
☑ Monday
☑ Tuesday
☑ Wednesday
☐ Thursday
☐ Friday

6. Once Add to Cart has been selected, the parent will be directed to the Cart/Payment screen

---

Optional Registration Features

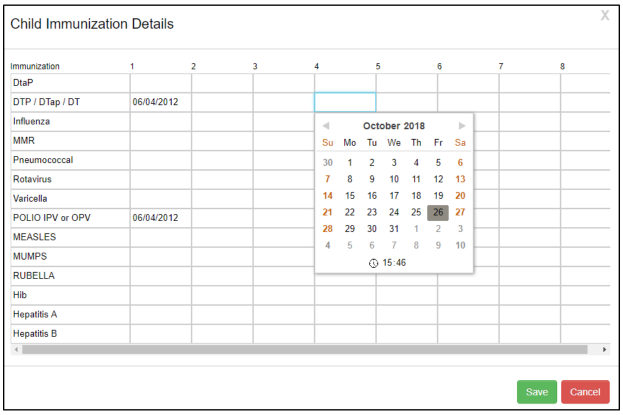
- Edit Immunizations - this allows parents to edit/add any immunizations
    - Click Edit Immunizations



Central Falls - 2018 Summer Swim Classes

School Year 2018-2019: 08/16/2018 - 05/31/2019

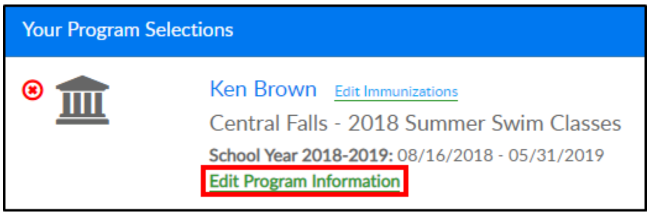
  - Click within the field to select the date the immunization was given



Immunization	1	2	3	4	5	6	7	8
DtaP								
DTP / DTap / DT	06/04/2012							
Influenza								
MMR								
Pneumococcal								
Rotavirus								
Varicella								
POLIO IPV or OPV	06/04/2012							
MEASLES								
MUMPS								
RUBELLA								
Hib								
Hepatitis A								
Hepatitis B								

  - Once immunizations are updated, click Save

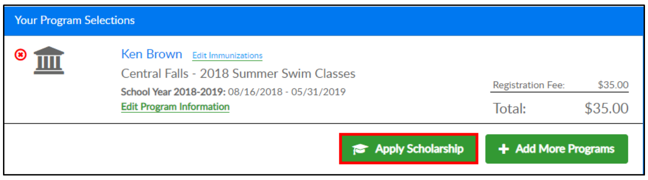
- Edit Program Information - this will display the registration form to make any necessary changes



Central Falls - 2018 Summer Swim Classes

School Year 2018-2019: 08/16/2018 - 05/31/2019

- Apply Scholarship - this option will discount the amount due. Scholarships must be setup on the system first
  - Click the Apply Scholarship button

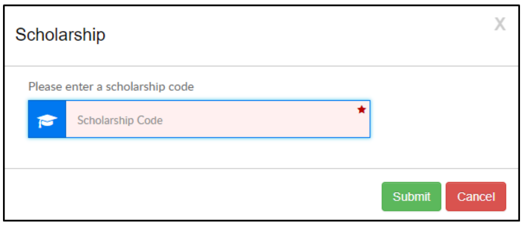


Central Falls - 2018 Summer Swim Classes

School Year 2018-2019: 08/16/2018 - 05/31/2019

Registration Fee:	$35.00
Total:	$35.00

  - Enter the Scholarship Code and click Submit



Please enter a scholarship code

- Add More Programs - this will allow the student(s) to be enrolled into more programs at the center

Your Program Selections

Ken Brown Edit Immunizations

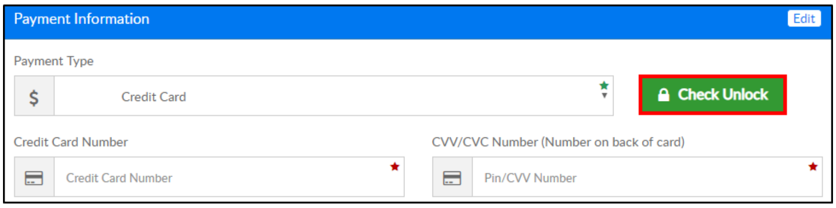
Central Falls - 2018 Summer Swim Classes

School Year 2018-2019: 08/16/2018 - 05/31/2019

Edit Program Information

Registration Fee:	$35.00
Total:	$35.00

- Check Unlock- this option will allow parents to complete registration without paying the balance, the balance will be placed on the family financial ledger. Check unlock codes are created and provided by the center
    - Click Check Unlock



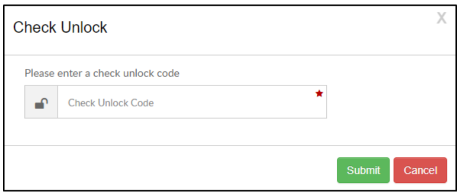
Payment Information

Payment Type: Credit Card

Credit Card Number: Credit Card Number

CVV/CVC Number (Number on back of card): Pin/CVV Number

    - Enter the check unlock code



Check Unlock

Please enter a check unlock code: Check Unlock Code

    - Click submit

Registration - Reconfirmation Text

Last Modified on 11/02/2018 1:25 pm EDT

For returning families, when the Registration tile is selected, there could be a reconfirmation popup. These popups are added by the administrator as a notification to parents to update/add specific information prior to completing registration.

Examples could include:

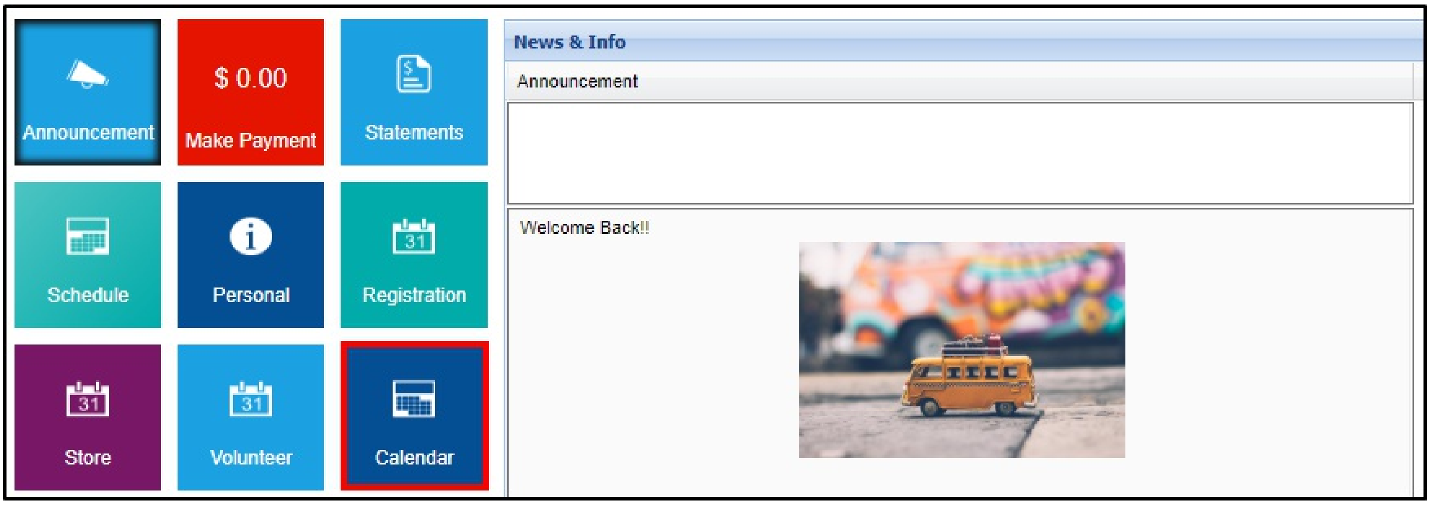
- Please review all student, parent, and contact detail prior to registering into a new program
- Two contacts MUST be entered prior to registering or the registration process cannot be completed

Key Point: Administrators can add this information by navigating to Setup > System Config. > Registration. Then enter the Reconfirmation Date and Reconfirmation Text.

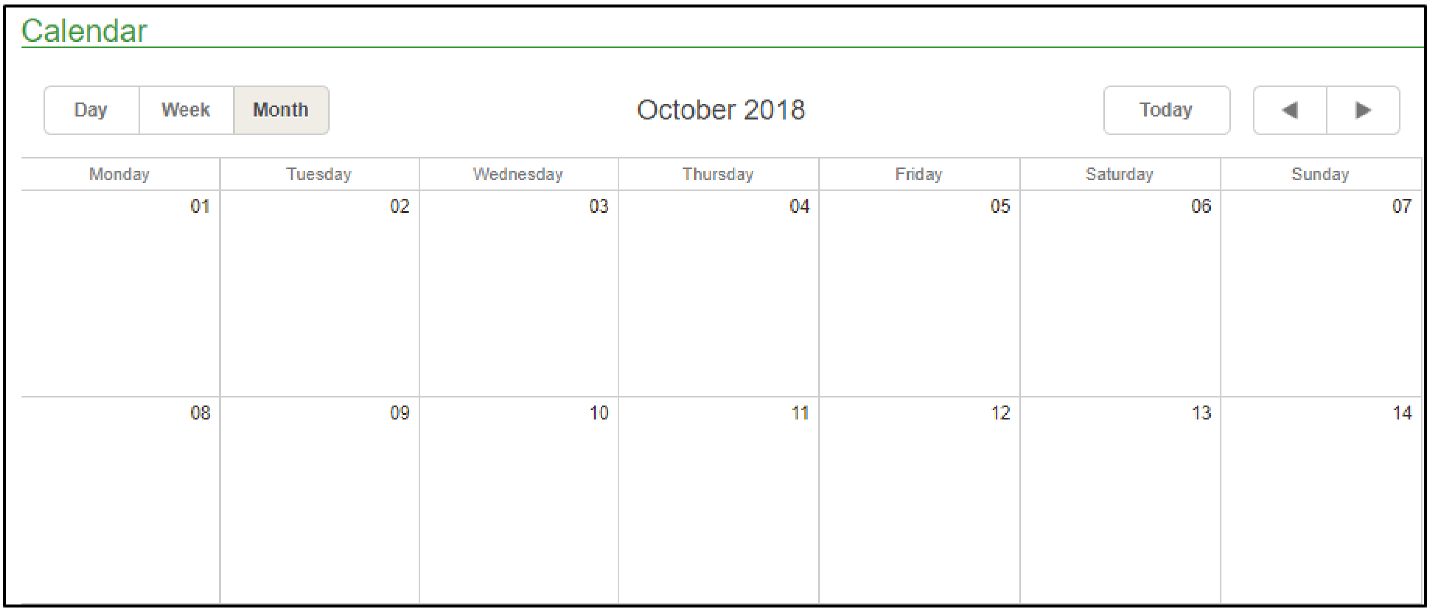
Parent Portal - Calendar

Last Modified on 10/25/2018 2:13 pm EDT

The Calendar section of the parent portal will display a listing of events that have been added by a staff/admin user. This information is not tied to programs the student is enrolled in, but can be displayed to certain demographic within a center.

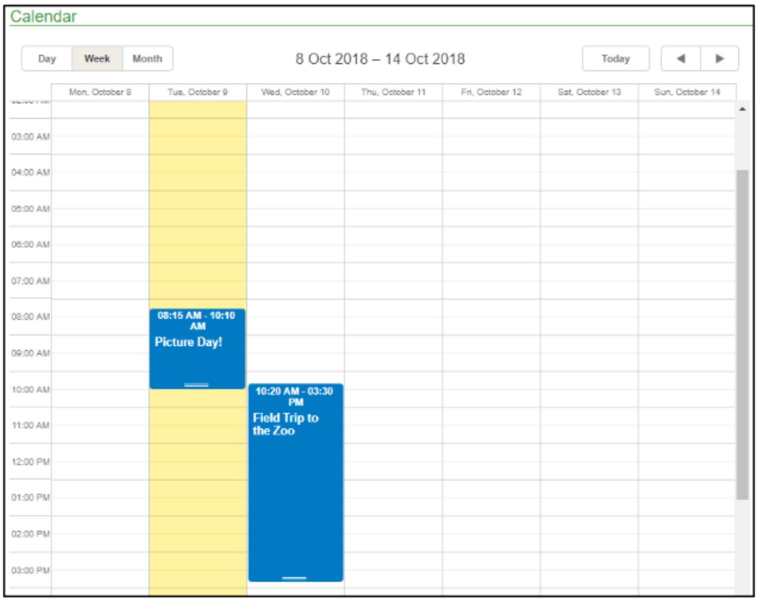


The calendar will open to the current month.



On the Calendar page, parents can click events for more information or click Export to PDF to download a copy of the calendar.

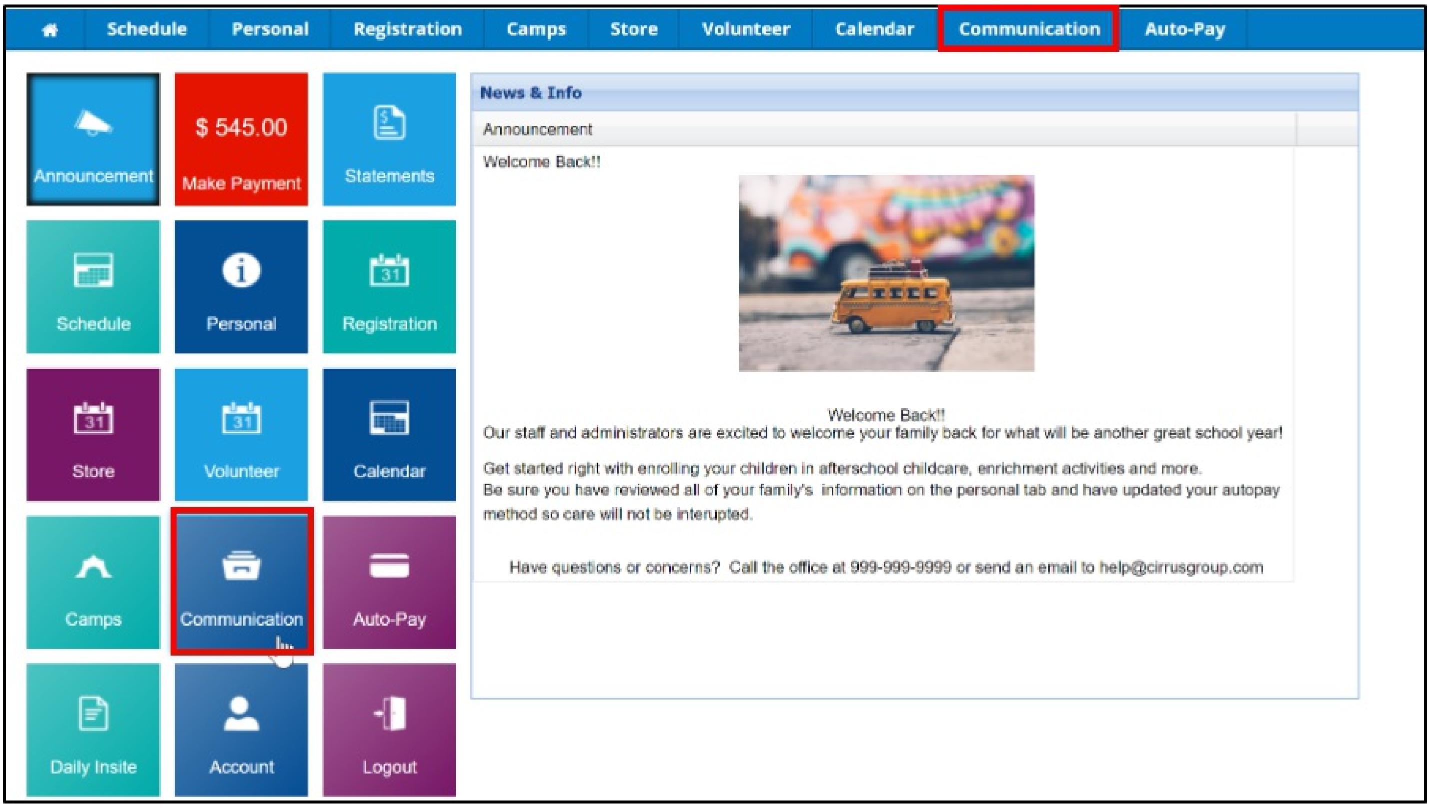
- The display of the calendar can be changed to view by Day, Week, or Month
- The arrows can be used to move to future or previous days, weeks, or months


Calendar
Day
Week
Month
8 Oct 2018 – 14 Oct 2018
Today
◀
▶
Mon, October 8
Tue, October 9
Wed, October 10
Thu, October 11
Fri, October 12
Sat, October 13
Sun, October 14
03:00 AM
04:00 AM
05:00 AM
06:00 AM
07:00 AM
08:00 AM
09:00 AM
10:00 AM
11:00 AM
12:00 PM
01:00 PM
02:00 PM
03:00 PM
08:15 AM - 10:10 AM
Picture Day!
10:20 AM - 03:30 PM
Field Trip to the Zoo

Parent Portal - Communication

Last Modified on 10/26/2018 11:35 am EDT

The Communication section of the portal allows parents to see generic documents, links, or teacher profiles.



News & Info

Announcement

Welcome Back!!

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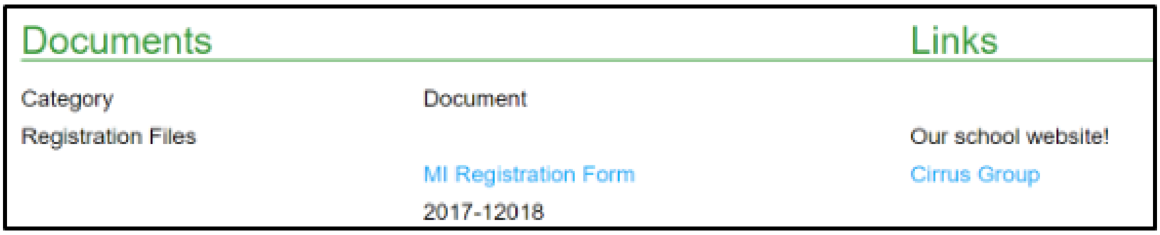
Our staff and administrators are excited to welcome your family back for what will be another great school year!

Get started right with enrolling your children in afterschool childcare, enrichment activities and more.
Be sure you have reviewed all of your family's information on the personal tab and have updated your autopay method so care will not be interupted.

Have questions or concerns? Call the office at 999-999-9999 or send an email to help@cirrusgroup.com

On the Communication page, any available documents will display, click the link to open the document or click the link under the Links section to go to the indicated page.



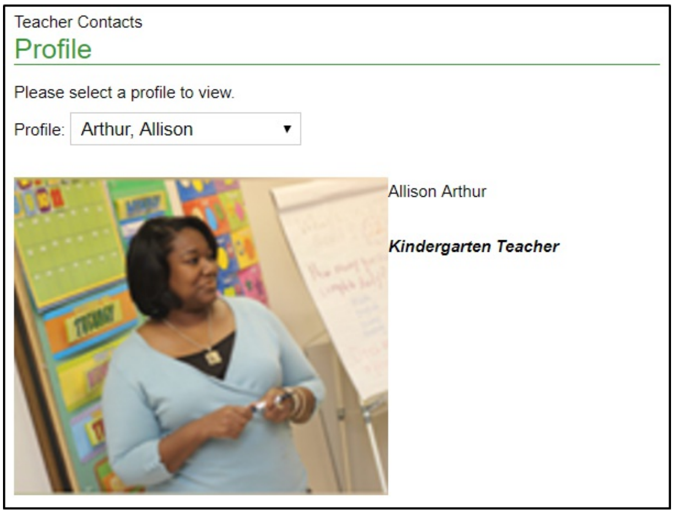
Documents

Category	Document
Registration Files	
	MI Registration Form
	2017-12018

Links

Our school website!
Cirrus Group

To view a teacher's profile, select the teacher's name from the drop down box. This profile information is pulled from Staff > Staff List screen on the admin site.



Teacher Contacts

Profile

Please select a profile to view.

Profile: Arthur, Allison

Allison Arthur

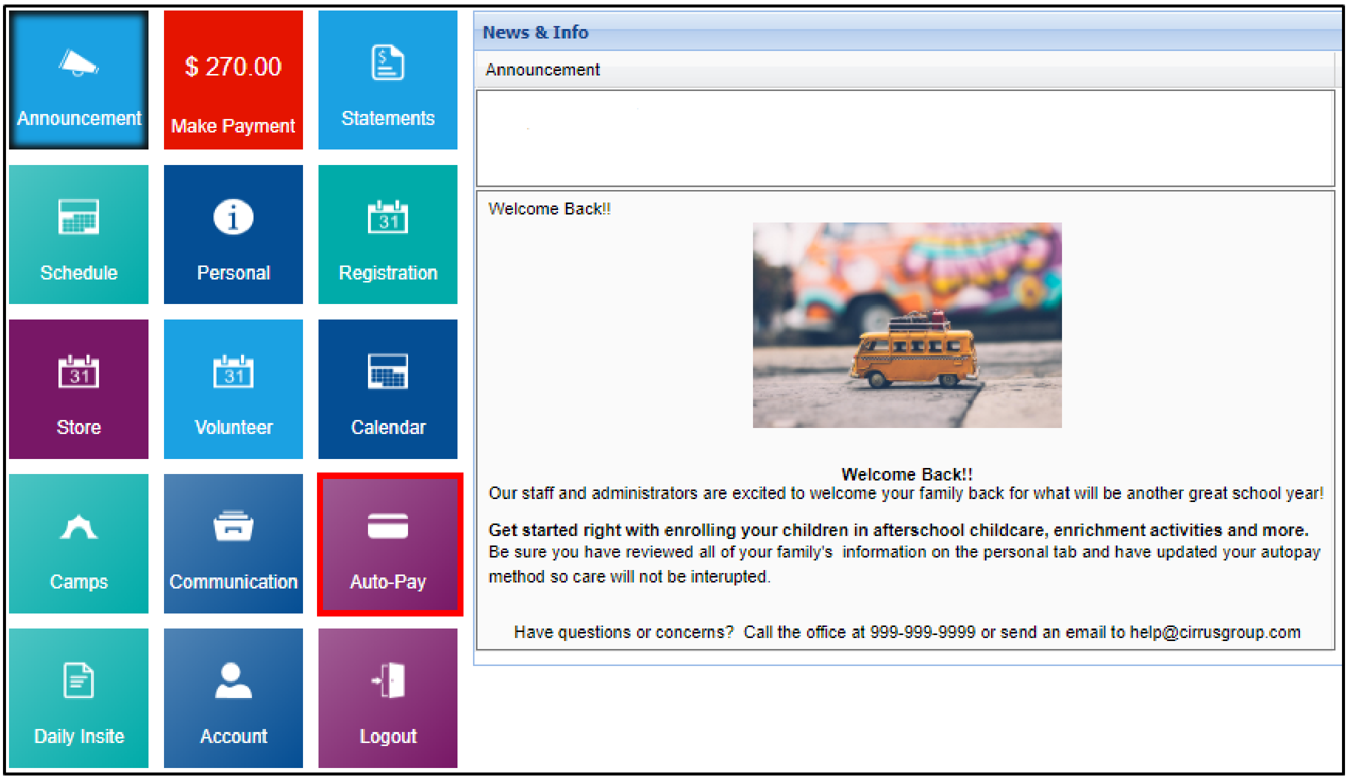
Kindergarten Teacher

Parent Portal - Auto-Pay

Last Modified on 12/04/2018 10:00 am EST

Auto-Pay allows a parent to enter payment information into the system and have their card automatically charged for fees

1. To add an auto-payment method, click the Auto-Pay tile from the home screen



News & Info

Announcement

Welcome Back!!

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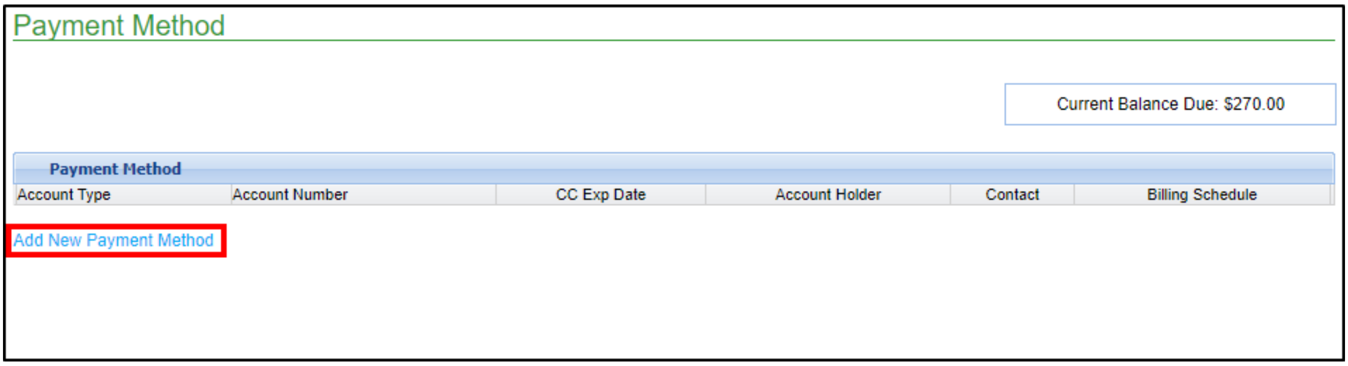
Get started right with enrolling your children in afterschool childcare, enrichment activities and more.
Be sure you have reviewed all of your family's information on the personal tab and have updated your autopay method so care will not be interupted.

Have questions or concerns? Call the office at 999-999-9999 or send an email to help@cirrusgroup.com

2. On the Payment Method screen, it will display the current balance, any current payment methods setup, and allow for a new payment method to be added. Click Add New Payment Method



Payment Method

Current Balance Due: $270.00

Payment Method

Account Type	Account Number	CC Exp Date	Account Holder	Contact	Billing Schedule

3. Once the Add New Payment Method screen appears, complete the necessary information. **Please Note:** Information added into this section can be edited or deleted as needed, if the center has this option enabled
    - Name, address, email, phone number

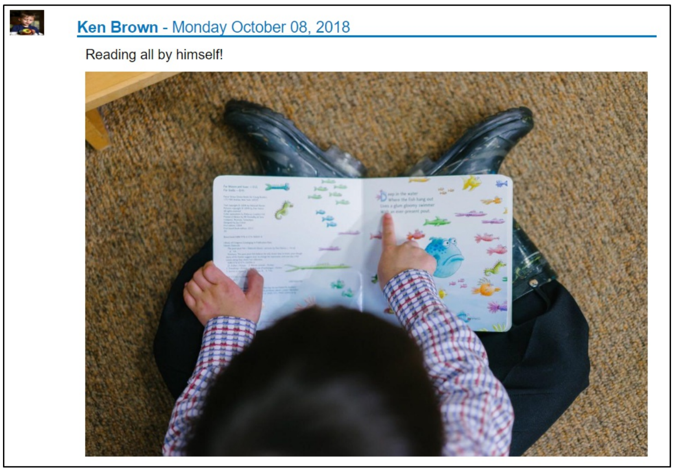
    - Credit/Debit Card Information

4. Once the information is entered, click Save

Parent Portal - Daily InSite

Last Modified on 10/25/2018 3:47 pm EDT

Daily InSites are added from the InSite Provider app. They provide parents with information about their student's day. Different categories can be added on the administrator site, such as reading, math, nap time, etc. Below is an example of an InSite a parent would see.



Ken Brown - Monday October 08, 2018

Reading all by himself!

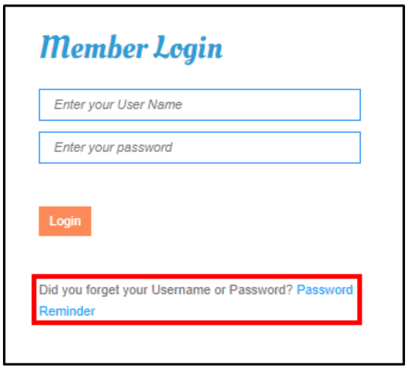
Parent Portal - Password Reminder

Last Modified on 12/04/2018 10:04 am EST

If an account becomes locked out or a password reset is needed, there is a Password Reminder option on the login screen for parents to use. Accounts lockout on the 5th invalid password attempt, for 5 minutes. After the 5-minute wait time, the account automatically unlocks.

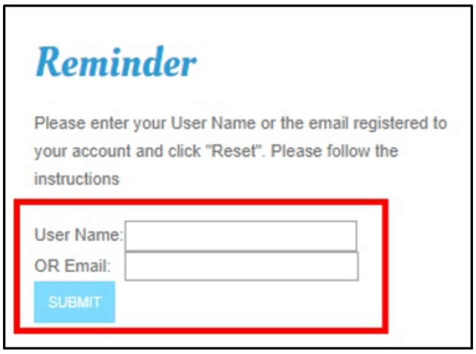
Parents will follow the steps below to obtain their username or create a new password:

1. On the login screen, click Password Reminder below the Login button



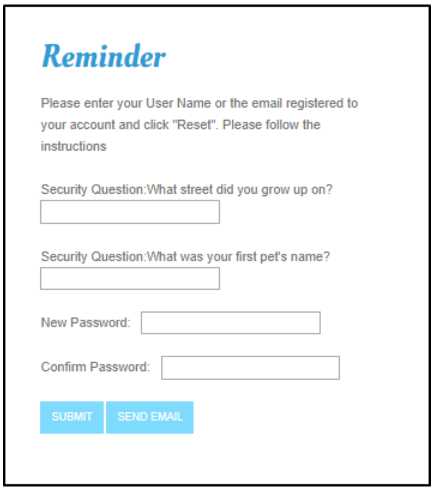
Did you forget your Username or Password? Password Reminder

2. Enter the User Name OR Email address and click Submit



Please enter your User Name or the email registered to your account and click "Reset". Please follow the instructions

3. If Security Questions are setup for the account, follow the steps below:
    - Answer the questions, then reset the password



Please enter your User Name or the email registered to your account and click "Reset". Please follow the instructions

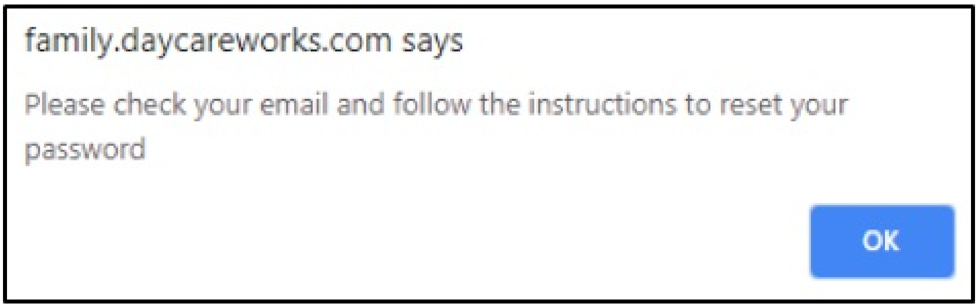
Security Question:What street did you grow up on?

Security Question:What was your first pet's name?

4. If Security Questions are not setup (Click here to set them up), follow the steps

below:

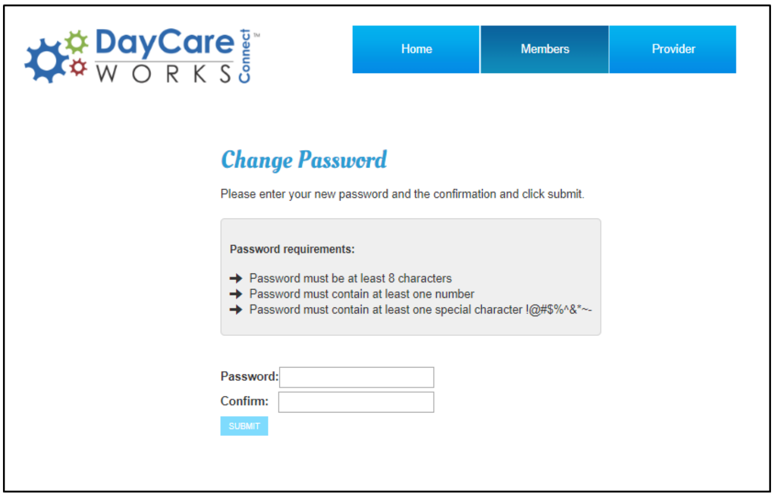
- The below notification will appear, click OK



family.daycareworks.com says

Please check your email and follow the instructions to reset your password

- An email is sent to the email address associated to the Connect Portal account. Click the link in the email to reset the password or locate the user name within the email message
- The link will launch the Change Password screen to create a new password



Change Password

Please enter your new password and the confirmation and click submit.

Password requirements:

→ Password must be at least 8 characters
→ Password must contain at least one number
→ Password must contain at least one special character !@#$%^&*~-

Password:
Confirm:

- Once a password is created, click Submit to log in

Please Note: If for any reason the Password Reminder option does not work, please contact the center for assistance.

Parent Portal - Account Screen

Last Modified on 10/25/2018 10:43 am EDT

The Account screen is where parents can locate the authentication code, change their password, update/add security questions, and link other accounts.

Account Information

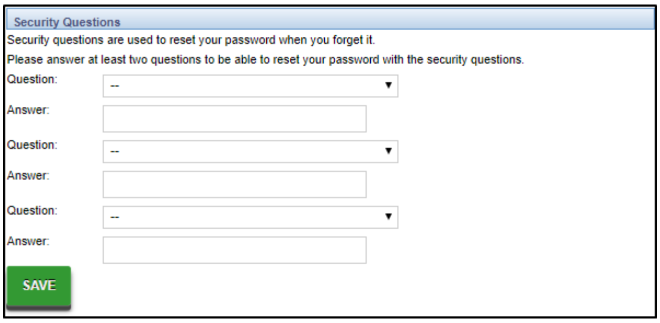
The account information section includes:

- User name - used to log into the Parent Portal and the InSite Connect app
- Authentication code - used to set up the InSite Connect app from the settings icon
- First and last name of user logging in
- Password requirements
- Ability to reset the password

Security Questions

The Security Questions section within the Account screen consists of 3 security questions. By answering at least 2 of the security questions, it allows the parent to reset their password on their own if they are unable to log into the Connect Portal.

Select the question from the drop-down list and enter the answer in the Answer field.



Security questions are used to reset your password when you forget it.

Please answer at least two questions to be able to reset your password with the security questions.

Link Accounts

If a family has multiple students at different locations, accounts can be linked in this section. Follow the steps below to set up a linked account.

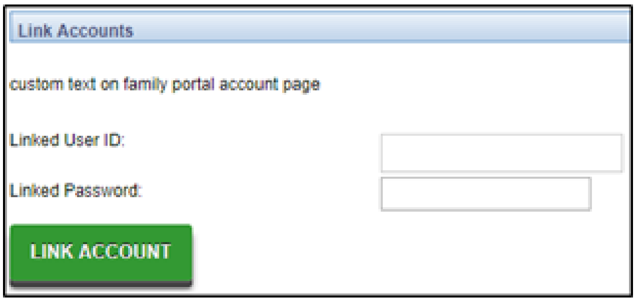
Turning On Linked Accounts

The option to link accounts must be set to "All Permissions" on the administrator site. Please follow the steps below:

1. Click Setup and select Admins
2. Click Actions, then select Setup Roles
3. In the Role drop-down, choose Family Portal (Not Allowed)
4. Locate the DCW Connect – Account section
5. Select All Permissions in the Add Linked Accounts drop-down

Linking an Account

1. Scroll to the Linked Accounts section



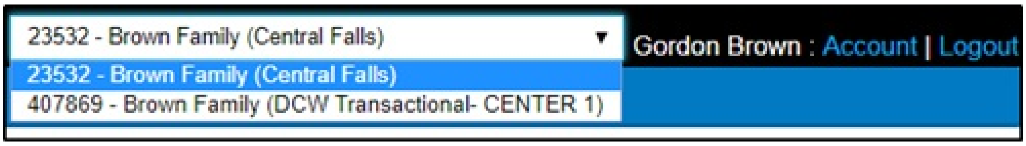
Link Accounts

custom text on family portal account page

Linked User ID:

Linked Password:

2. Enter the Connect user ID and password of the account to link
3. Click Link Account
4. To switch between accounts, click the drop-down in the top right corner of the Connect website to select which student/location to view



23532 - Brown Family (Central Falls)

23532 - Brown Family (Central Falls)

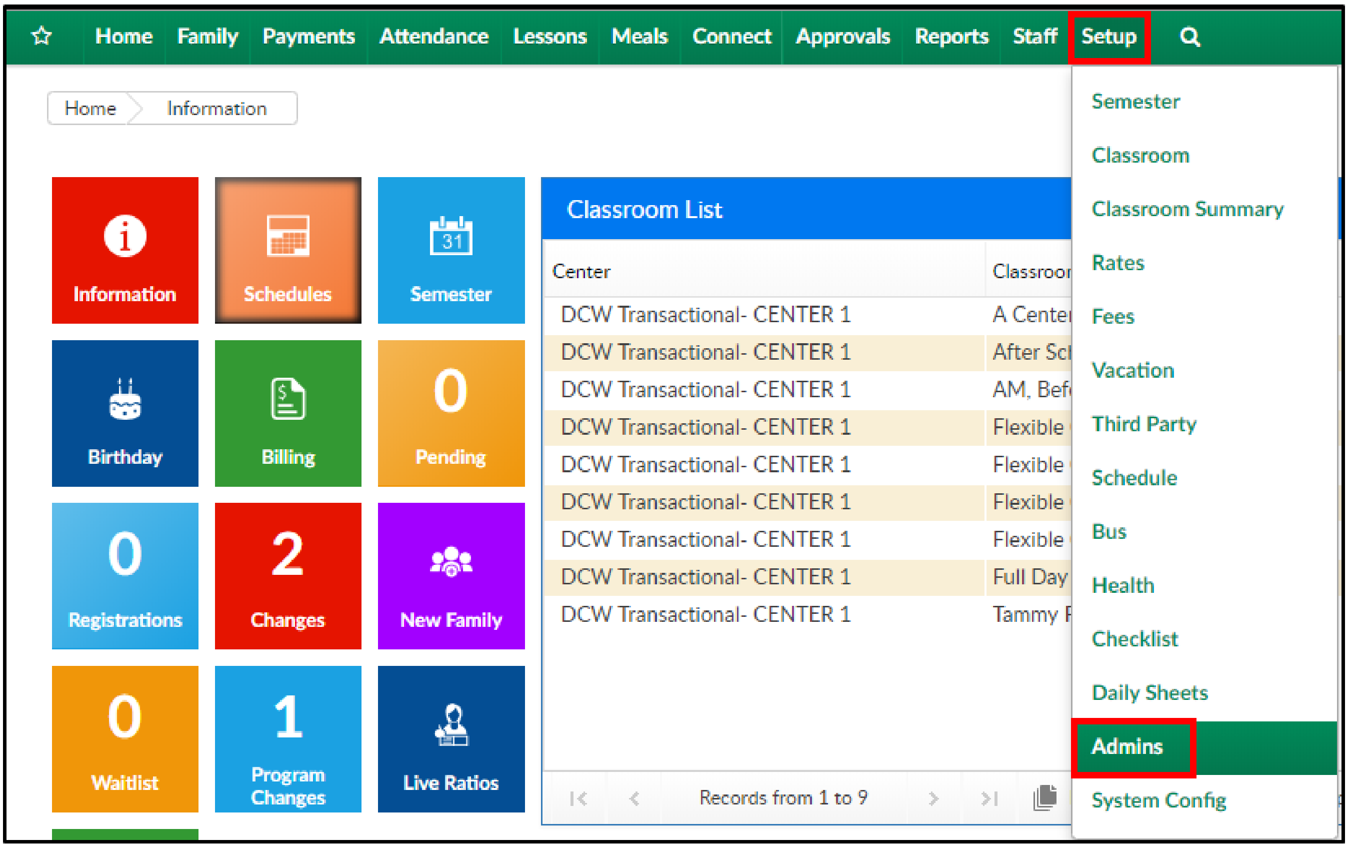
407869 - Brown Family (DCW Transactional- CENTER 1)

Teacher/Staff Portal - Setup

Last Modified on 12/04/2018 10:36 am EST

The Teacher/Staff portal must be setup on the Administrator side. Follow the instructions below to setup permissions:

1. From the Setup menu, click Admins

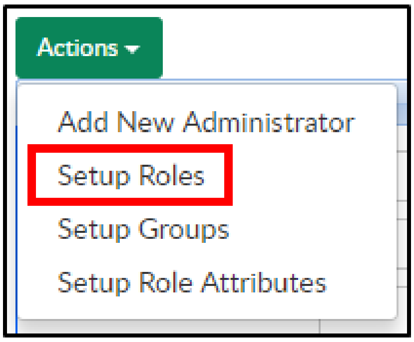


Classroom List

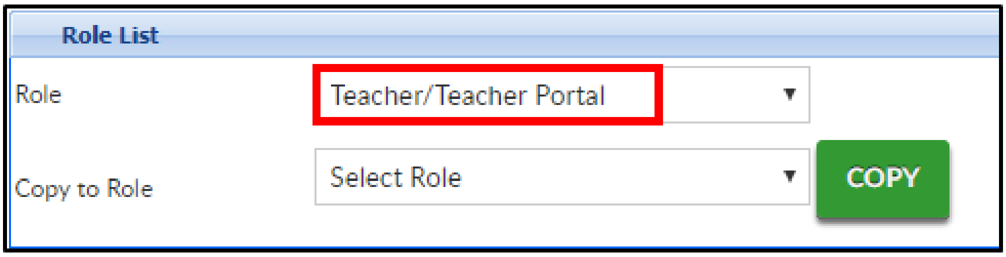
Center	Classroor
DCW Transactional- CENTER 1	A Cente
DCW Transactional- CENTER 1	After Sc
DCW Transactional- CENTER 1	AM, Bef
DCW Transactional- CENTER 1	Flexible
DCW Transactional- CENTER 1	Flexible
DCW Transactional- CENTER 1	Flexible
DCW Transactional- CENTER 1	Flexible
DCW Transactional- CENTER 1	Full Day
DCW Transactional- CENTER 1	Tammy F

Records from 1 to 9

2. Click Actions, then select Setup Roles



3. Select Teacher/Teacher Portal in the Role List section


Role List

Role: Teacher/Teacher Portal

Copy to Role: Select Role

4. By default, this role will only be able to log in through the portal
    - https://connect.schoolcareworks.com
    - https://family.daycareworks.com
5. The most common Activity IDs modified are listed below:
6. DCW Connect Document Merge- these are options that if enabled will allow staff to batch pull information records:
    - 1331 Document Type -Immunization/PDF
    - 1332 Document Type- Child Form/PDF
    - 1333 Document Type - Information Record and Immunization/PDF
    - 1334 Document Type- Dynamic Child Form/PDF
    - 1335 Document Type- Phlote/PDF
    - 1336 Document Type- Enrollment Form/PDF
    - 1337 Document Type - Enrollment Form/PDF and Child Form/PDF
    - 1338 Document Type Enrollment Form/PDF and Dynamic Child Form/PDF

    - 1339 Document Type- Custom Form Selection
    - 1340 Document Type- Child Information Record Alt 1
    - 1341 Document Type- Child Information Record Alt 2
    - 1342 Document Type- Child Information Record Alt 3
7. DCW Connect Vendor/Teacher Portal
    - 1430 Session Roster- Program Reports
8. DCW Connect Vendor/Teacher Portal
    - 1401 As PDF Program Reports
    - 1402 As Excel Program Reports
    - 1403 Roster - Excel Program Reports
    - 1404 Roster - PDF Program Reports
    - 1405 Roster (by student) Excel Program Reports
    - 1406 Roster (by student) PDF Program Reports
    - 1407 Roster Excel (by program) Program Reports
    - 1408 Semester Roster Excel Program Reports
    - 1409 Event Roster Excel Program Reports

    - 1410 Registration Excel Program Reports
    - 1411 Registration PDF Program Reports
    - 1412 Registration Semester Excel Program Reports
    - 1413 Field Trip Permission Slip PDF Program Reports
    - 1414 Field Trip Permission Slip PDF v2 Program Reports
    - 1415 Weekly Schedule by Grade PDF Program Reports
    - 1416 Weekly Schedule by Name PDF Program Reports
    - 1417 Registration (Adult) Excel Program Reports
    - 1418 Current Roster v2 - Excel Current Roster v2 - Excel
    - 1419 Weekly Roster Summary - Excel Program Reports
    - 1421 Directory Tab Directory Tab
    - 1422 Attendance Tab Attendance Tab
    - 1423 At a Glance Tab At a Glance Tab
    - 1424 Schedule Tab Schedule Tab
    - 1702 Weekly Roster Summary - PDF Program Reports
9. Reports - Room/Program Tab
    - 164 Available Merged Documents- Displays the Documents Merged List

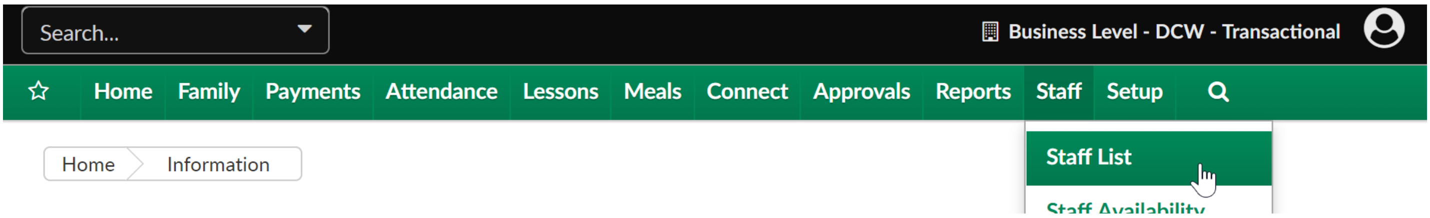
How to authroize staff to see students in the Teacher/Staff portal

Last Modified on 03/21/2018 9:17 am EDT

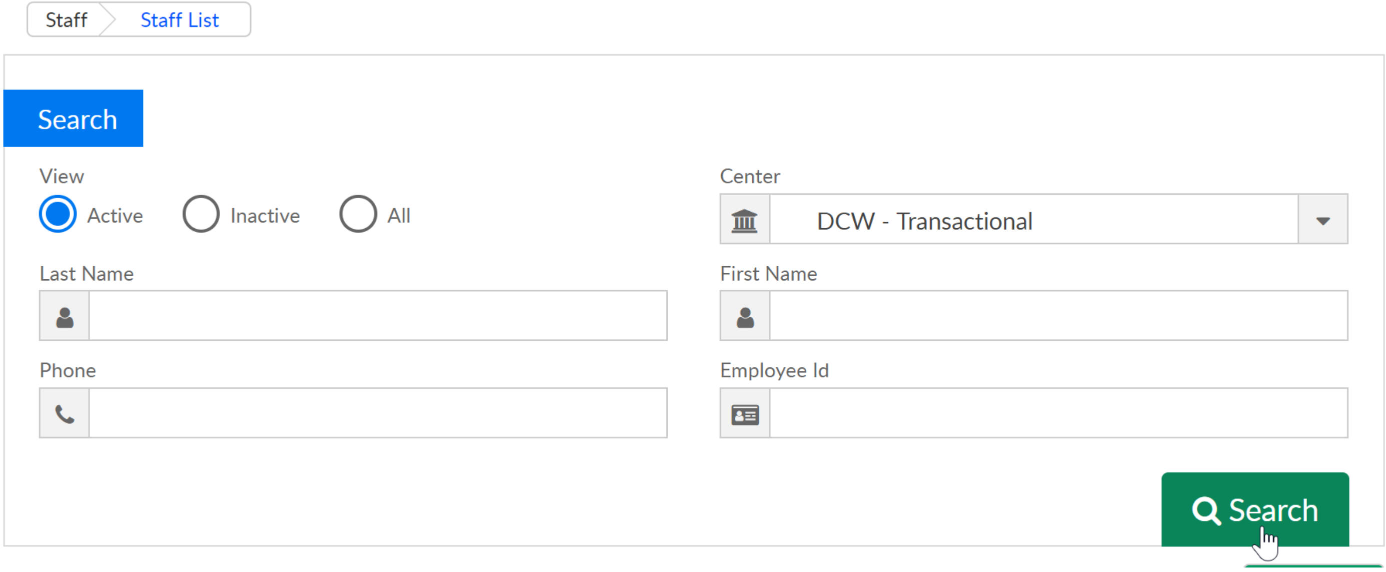
The Staff portal allows staff or teachers the ability to assign staff members or teachers to specific classrooms or categories for semesters.

Staff members can log into the staff protal using the staff portal, where they can create a small set of reports, record attendance or view directories for the assigned classroom. Staff members do not have access to financial records.

From the main menu select the Staff menu, then select Staff List.



Search for staff by entering criteria in the search area, then press the Search button.



View

● Active ○ Inactive ○ All

Center: DCW - Transactional

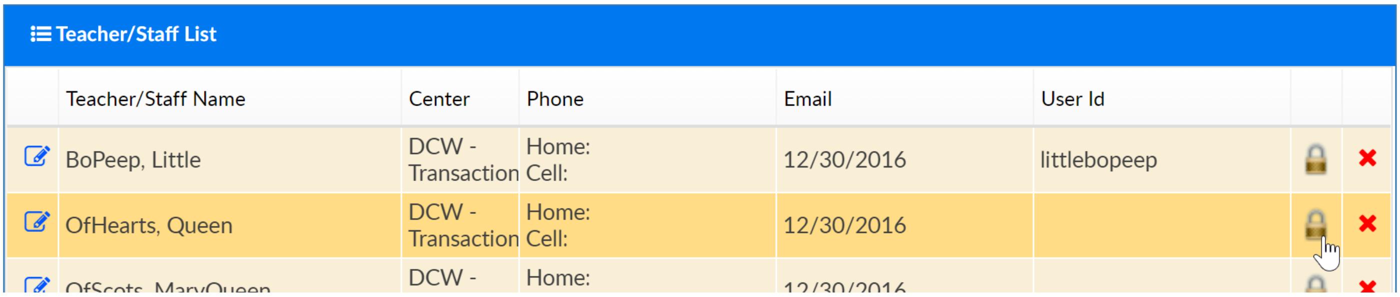
Last Name

First Name

Phone

Employee Id

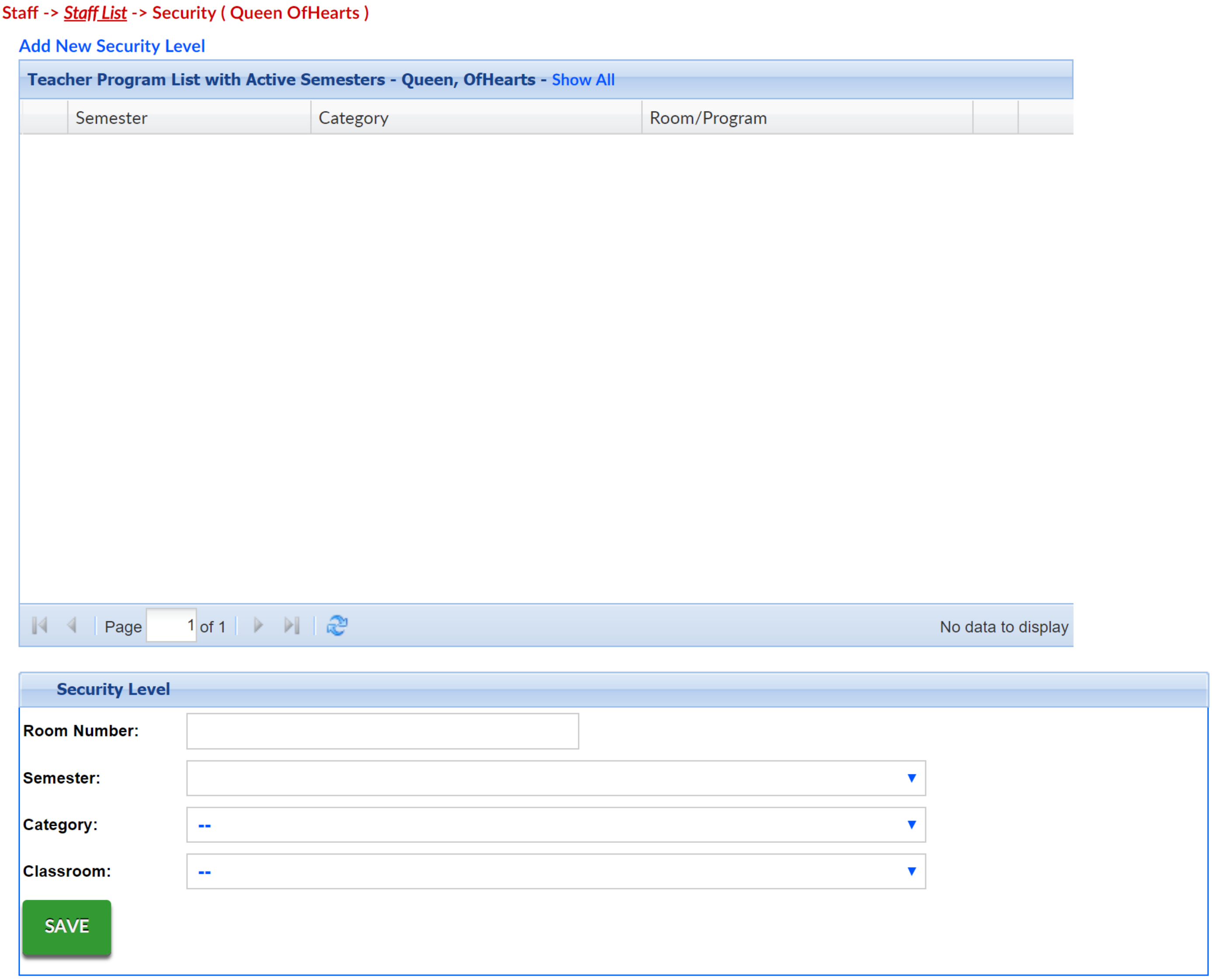
Select the lock icon next to the teachers name in the Teacher/Staff List box.



Teacher/Staff List

	Teacher/Staff Name	Center	Phone	Email	User Id		
✎	BoPeep, Little	DCW - Transaction	Home: Cell:	12/30/2016	littlebopeep	🔒	✖
✎	OfHearts, Queen	DCW - Transaction	Home: Cell:	12/30/2016		🔒	✖
✎	OfScots, MaryQueen	DCW -	Home:	12/30/2016		🔒	✖

If the staff has already been authorized to any semesters, categories or classrooms the detail will display in the top box.



Staff -> Staff List -> Security (Queen OfHearts)

Add New Security Level

Teacher Program List with Active Semesters - Queen, OfHearts - Show All

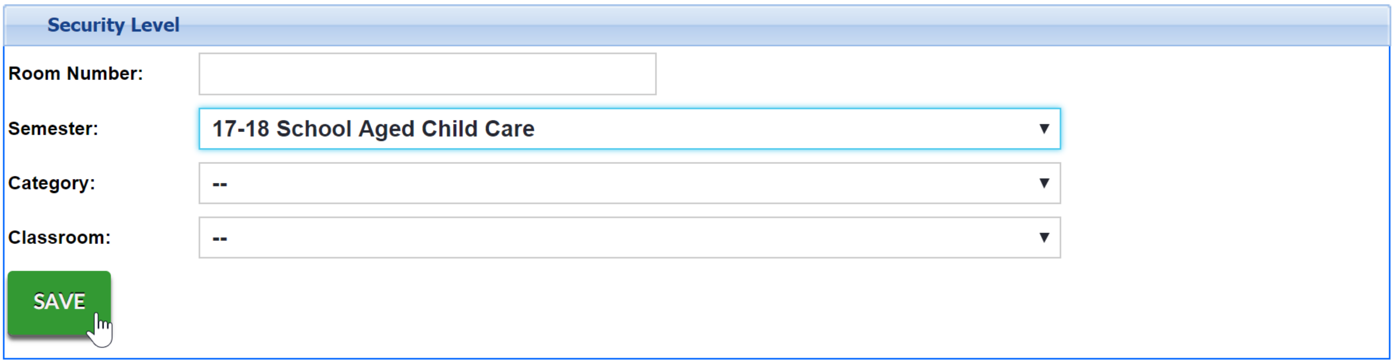
	Semester	Category	Room/Program		

Security Level

Room Number:	
Semester:	
Category:	--
Classroom:	--

To add a new authorization go to the Security Level section and select the combination of semester, category or classroom details, then press save.

If you want a teacher to see all students associated with a certain semester select only the semester.



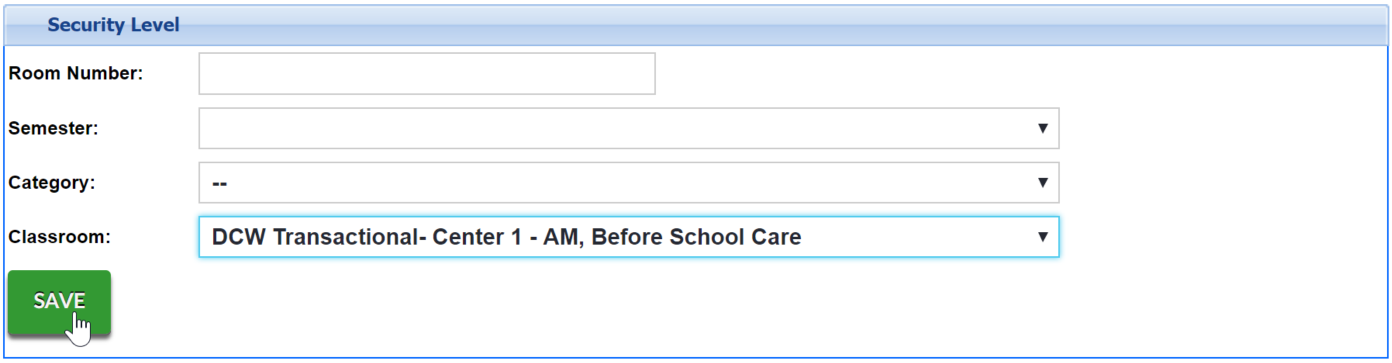
Room Number:

Semester: 17-18 School Aged Child Care

Category: --

Classroom: --

If you want a teacher to be able to see students only in a particular classroom, you would select only the classroom that they should see.



Room Number:

Semester:

Category: --

Classroom: DCW Transactional- Center 1 - AM, Before School Care

You would continue this process until the teacher has access to the students you want them to be able to see.

Teacher/Staff Portal Overview

Last Modified on 10/30/2018 9:22 am EDT

The Teacher/Staff Portal is a hub that any user added under Staff > Staff List will have access to. By default, those teachers and staff members will be associated with the staff/teacher portal role.

On the home screen of the portal, the below tiles are available:

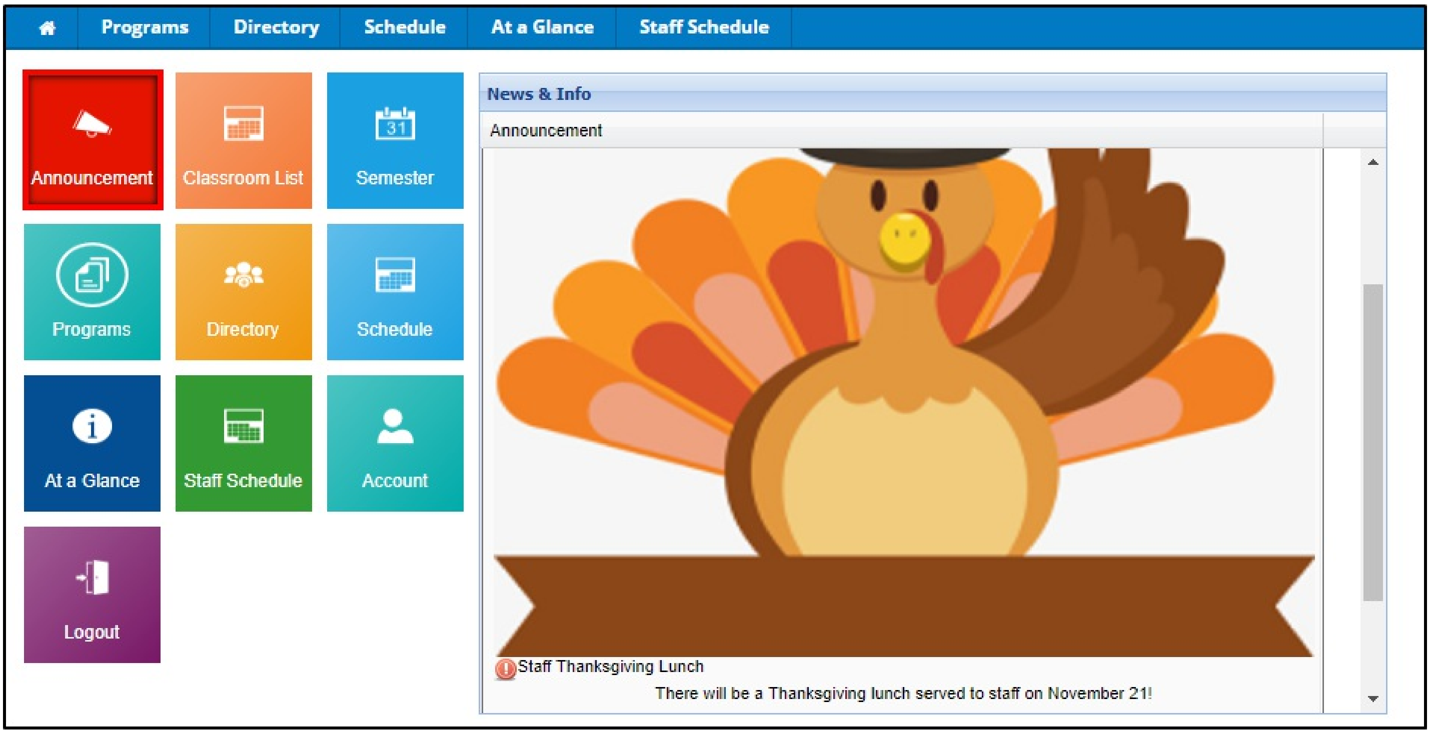
- Announcement - important and general information is posted here from the business level or admin users.
  - Announcements are created from the admin side under Connect > Announcements
- Classroom List - this list displays the number of children expected by center and classroom on each day
- Semester - this displays the number of children expected by center, classroom, and semester
- Programs- this tile allows staff to pull classroom reports and the ability to merge information records
- Directory - staff is able to pull Directory Reports by semester, category, or classroom
- Schedule - this section will allow staff to check in/out students
- At a Glance - allows staff to pull a report based on center, semester, or classroom. Report displays student's full name, phone number, and guardian information
- Staff Schedule - will display the staff members schedule and able to view attendance
- Account - displays the staff member's user name, authentication code, full name, and the ability to reset their password

---

Teacher/Staff Portal - Announcement

Last Modified on 10/30/2018 11:47 am EDT

When logging into the Teacher/Staff Portal, the Announcements will be displayed. Announcements contain important information and are posted from the administrator side.



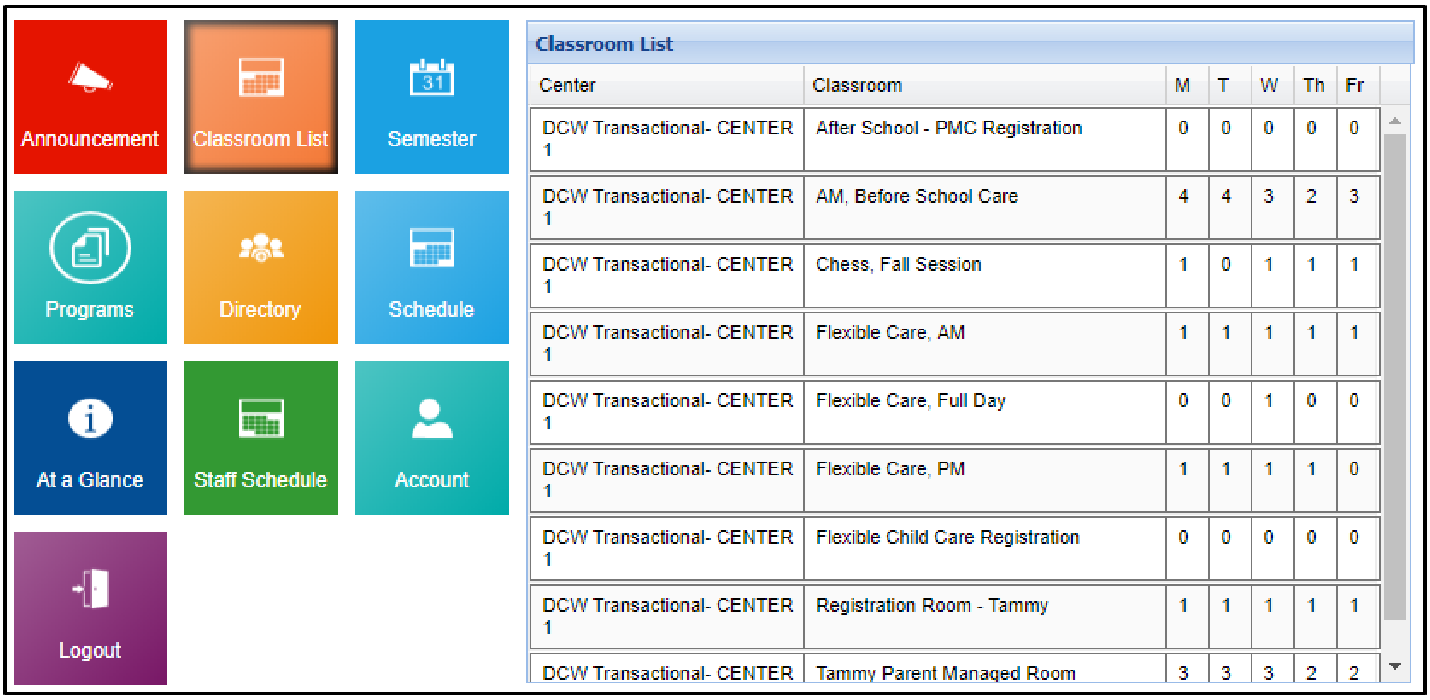
Staff Thanksgiving Lunch

There will be a Thanksgiving lunch served to staff on November 21!

Teacher/Staff Portal - Classroom List

Last Modified on 10/30/2018 9:31 am EDT

The Classroom List tile will display the expected number of students per day by center and classroom.



Classroom List

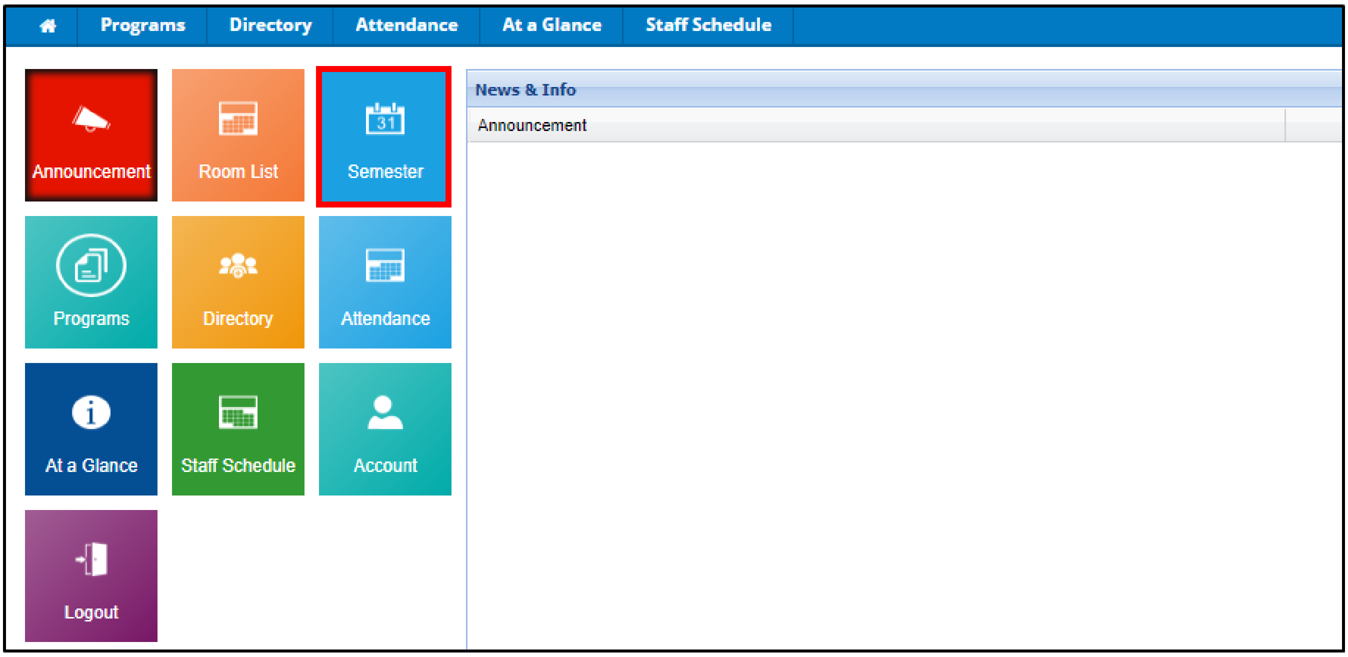
Center	Classroom	M	T	W	Th	Fr
DCW Transactional- CENTER 1	After School - PMC Registration	0	0	0	0	0
DCW Transactional- CENTER 1	AM, Before School Care	4	4	3	2	3
DCW Transactional- CENTER 1	Chess, Fall Session	1	0	1	1	1
DCW Transactional- CENTER 1	Flexible Care, AM	1	1	1	1	1
DCW Transactional- CENTER 1	Flexible Care, Full Day	0	0	1	0	0
DCW Transactional- CENTER 1	Flexible Care, PM	1	1	1	1	0
DCW Transactional- CENTER 1	Flexible Child Care Registration	0	0	0	0	0
DCW Transactional- CENTER 1	Registration Room - Tammy	1	1	1	1	1
DCW Transactional- CENTER	Tammy Parent Managed Room	3	3	3	2	2

Teacher/Staff Portal - Semester

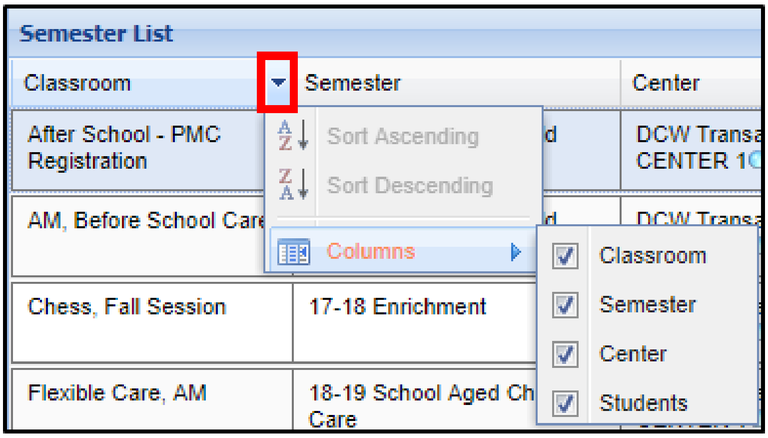
Last Modified on 10/30/2018 11:27 am EDT

The Semester tile will display the expected number of students

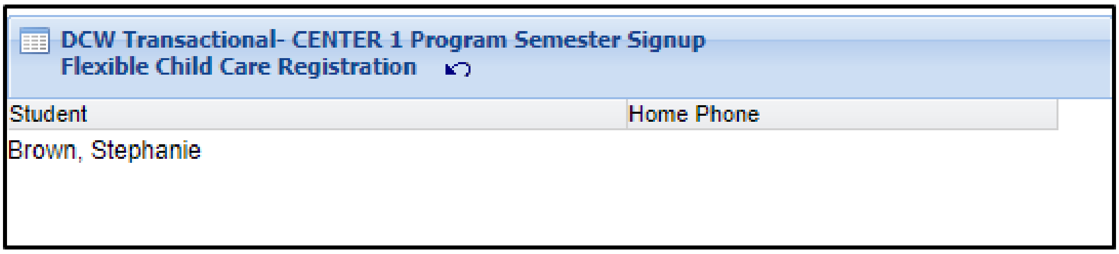
1. Click Semester from the Staff portal home screen



2. The Semester List will show classrooms, semesters, center, and students. Columns can be added or removed as needed by clicking the column header, then click the arrow



3. Clicking on the magnifying class in the Center column will show the list of students currently signed up. Students will be listed in alphabetical order with their home phone number



DCW Transactional- CENTER 1 Program Semester Signup
Flexible Child Care Registration

Student	Home Phone
Brown, Stephanie	

Teacher/Staff Portal - Programs

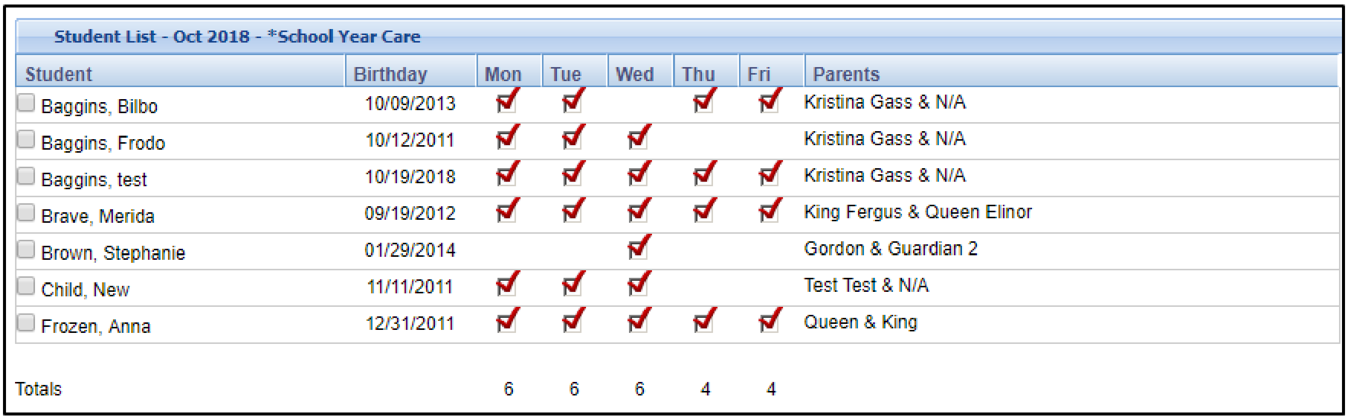
Last Modified on 12/04/2018 10:23 am EST

The Program tile allows teachers/staff to pull reports based on certain criteria.

1. In the Classroom Reports section, use the View drop-down and select a report type - see below for report details
2. Choose the Report Criteria
    - Center - select a location/center
    - Semester - select the correct semester
    - Category - choose a category, if applicable
    - Classroom - select the classroom from the list
    - From Date - enter the start date of the report
3. Click Create Report
4. The report will then open in the chosen format

Report Types

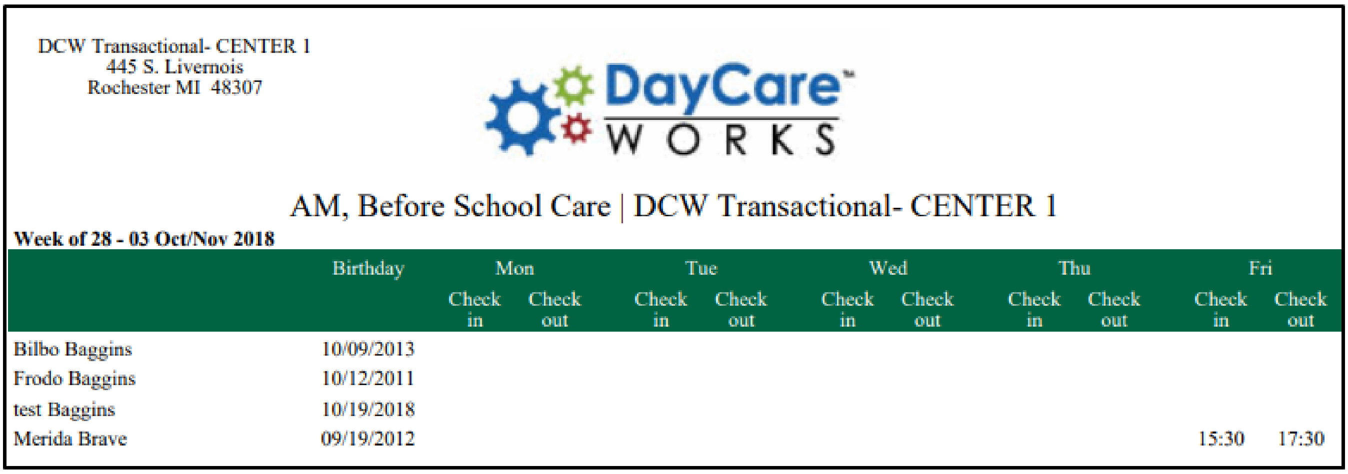
- Online



Student List - Oct 2018 - *School Year Care

Student	Birthday	Mon	Tue	Wed	Thu	Fri	Parents
☐ Baggins, Bilbo	10/09/2013	✓	✓		✓	✓	Kristina Gass & N/A
☐ Baggins, Frodo	10/12/2011	✓	✓	✓			Kristina Gass & N/A
☐ Baggins, test	10/19/2018	✓	✓	✓	✓	✓	Kristina Gass & N/A
☐ Brave, Merida	09/19/2012	✓	✓	✓	✓	✓	King Fergus & Queen Elinor
☐ Brown, Stephanie	01/29/2014			✓			Gordon & Guardian 2
☐ Child, New	11/11/2011	✓	✓	✓			Test Test & N/A
☐ Frozen, Anna	12/31/2011	✓	✓	✓	✓	✓	Queen & King
Totals		6	6	6	4	4	

- Online (Compress) - same as the Online report, but if a student has two entries for a category, the entries will be condensed into one entry
- AS PDF - contains student, birthday, days of the week the student attends, parents, and notes section



DCW Transactional- CENTER 1
445 S. Livernois
Rochester MI 48307

DayCare WORKS

AM, Before School Care | DCW Transactional- CENTER 1

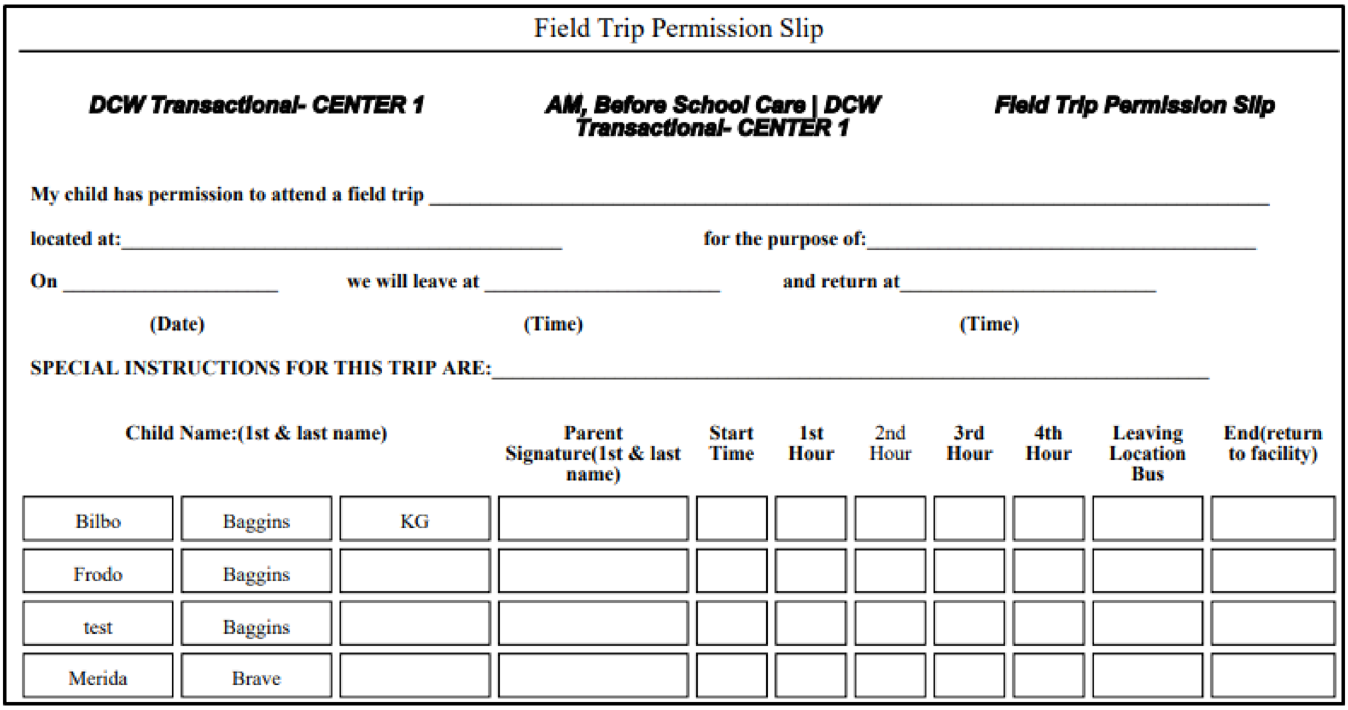
Week of 28 - 03 Oct/Nov 2018

	Birthday	Mon		Tue		Wed		Thu		Fri	
		Check in	Check out	Check in	Check out	Check in	Check out	Check in	Check out	Check in	Check out
Bilbo Baggins	10/09/2013										
Frodo Baggins	10/12/2011										
test Baggins	10/19/2018										
Merida Brave	09/19/2012									15:30	17:30

- As Excel - pulls the Weekly Room Report, which includes name, sign in/out times, parent information, admission date, and birthday
- Roster - Excel - this report displays student name, program, and if they are attending AM and/or PM in Excel format
- Roster - PDF - this report displays student name, program, and if they are attending AM and/or PM in PDF format
- Roster (by student) - Excel
- Roster (by student) - PDF
- Roster - Excel (by program) - contains registration date, students, program, semester, student schedule by AM/PM. This report is sorted alphabetically by Program name
- Semester Roster - Excel - this report contains all semesters, categories, center, student name, grade (if applicable), program, rate, and requested start date
- Event Roster - Excel - contains student name, center, room, and birthday
- Registration - Excel - this report displays the following: registration date, requested start date, room, online registration, grade level, student name, birthday, phone number, address, health/medical, guardian information, lead source, and questions in Excel format
- Registration - PDF - this report displays the following: registration date, requested start date, room, online registration, grade level, student name, birthday, phone number, address, health/medical, guardian information, lead source, and questions in PDF format
- Registration Semester - Excel - this Excel report contains the following columns: registration ID, registration date, semester, semester start/end dates, category,

center, program, activity code, student and family IDs, student demographics, guardian information, reporting, lead source, student center, and questions

- Field Trip Permission Slip - PDF



Field Trip Permission Slip

DCW Transactional- CENTER 1 **AM, Before School Care | DCW Transactional- CENTER 1** **Field Trip Permission Slip**

My child has permission to attend a field trip ____

located at:______________________________ for the purpose of:______________________________

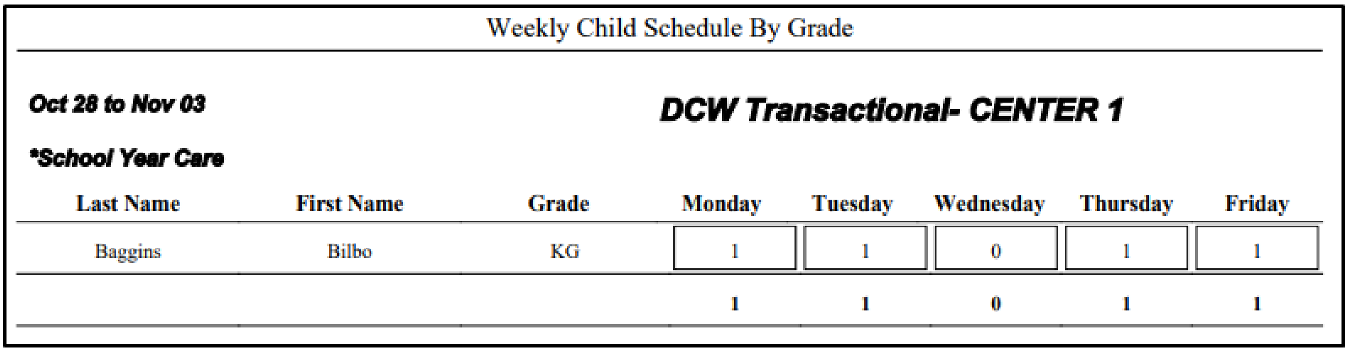
On ________________ we will leave at ________________ and return at ________________

(Date) (Time) (Time)

SPECIAL INSTRUCTIONS FOR THIS TRIP ARE:____

Child Name:(1st & last name)			Parent Signature(1st & last name)	Start Time	1st Hour	2nd Hour	3rd Hour	4th Hour	Leaving Location Bus	End(return to facility)
Bilbo	Baggins	KG								
Frodo	Baggins									
test	Baggins									
Merida	Brave									

- Field Trip Permission Slip - PDF Version 2
- Weekly Schedule By Grade - PDF



Weekly Child Schedule By Grade

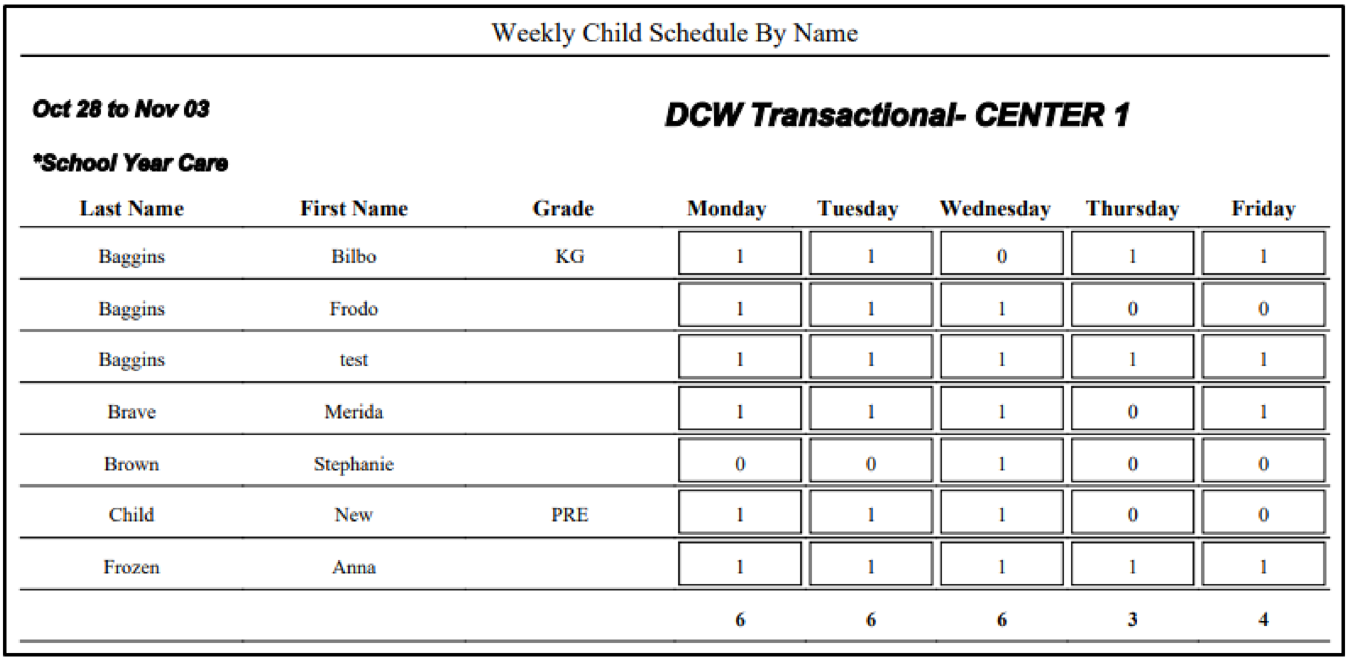
Oct 28 to Nov 03

DCW Transactional- CENTER 1

***School Year Care**

Last Name	First Name	Grade	Monday	Tuesday	Wednesday	Thursday	Friday
Baggins	Bilbo	KG	1	1	0	1	1
			1	1	0	1	1

- Weekly Schedule By Name - PDF



Weekly Child Schedule By Name

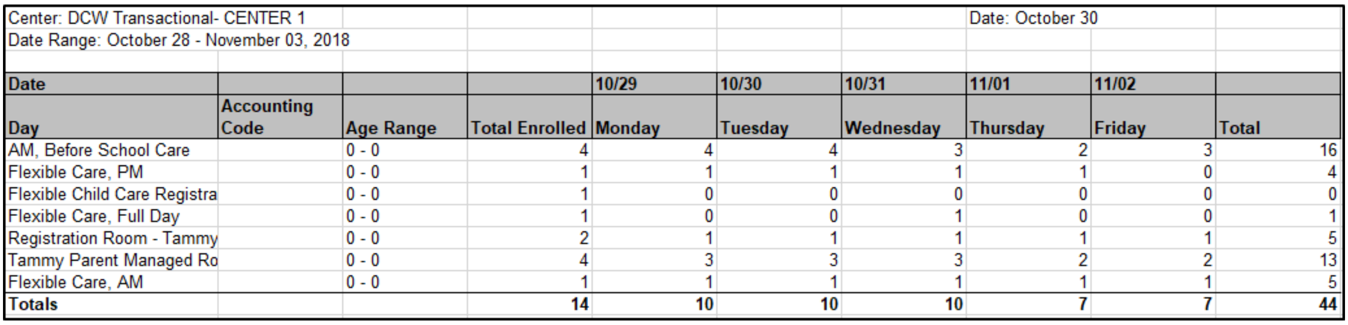
Oct 28 to Nov 03

DCW Transactional- CENTER 1

***School Year Care**

Last Name	First Name	Grade	Monday	Tuesday	Wednesday	Thursday	Friday
Baggins	Bilbo	KG	1	1	0	1	1
Baggins	Frodo		1	1	1	0	0
Baggins	test		1	1	1	1	1
Brave	Merida		1	1	1	0	1
Brown	Stephanie		0	0	1	0	0
Child	New	PRE	1	1	1	0	0
Frozen	Anna		1	1	1	1	1
			6	**6**	**6**	**3**	**4**

- Registration (Adult) - Excel - this report displays the following information for adult students: registration ID, payment type, registration amount, center, semester, program, student demographics, employer information, lead source, and questions
- Weekly Roster Summary - Excel

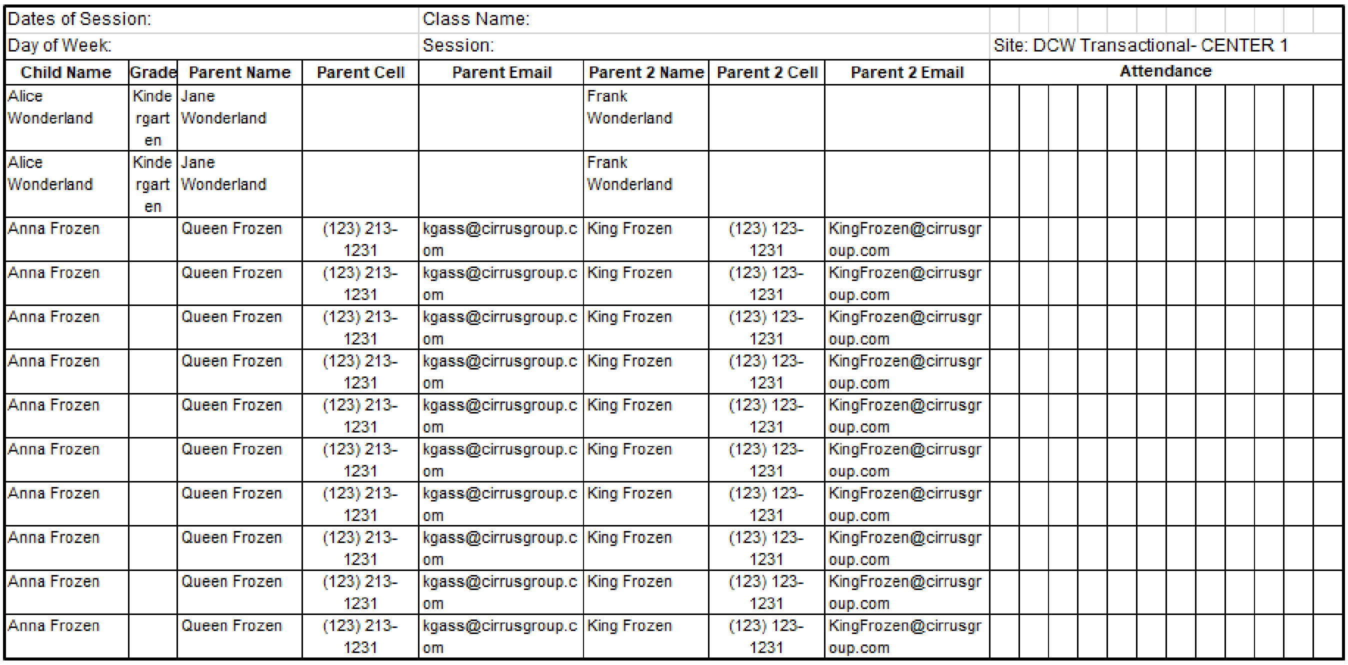


Center: DCW Transactional- CENTER 1 Date: October 30

Date Range: October 28 - November 03, 2018

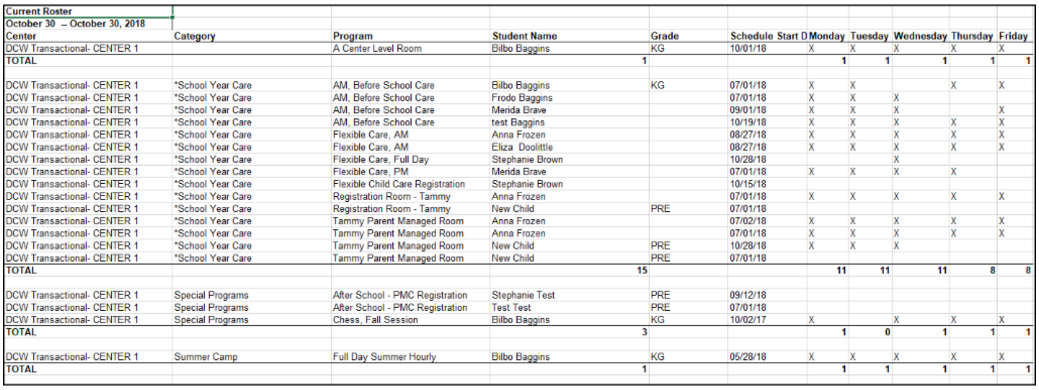
Date				**10/29**	**10/30**	**10/31**	**11/01**	**11/02**	
Day	**Accounting Code**	**Age Range**	**Total Enrolled**	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Total**
AM, Before School Care		0 - 0	4	4	4	3	2	3	16
Flexible Care, PM		0 - 0	1	1	1	1	1	0	4
Flexible Child Care Registra		0 - 0	1	0	0	0	0	0	0
Flexible Care, Full Day		0 - 0	1	0	0	1	0	0	1
Registration Room - Tammy		0 - 0	2	1	1	1	1	1	5
Tammy Parent Managed Ro		0 - 0	4	3	3	3	2	2	13
Flexible Care, AM		0 - 0	1	1	1	1	1	1	5
Totals			**14**	**10**	**10**	**10**	**7**	**7**	**44**

- Session Roster - Excel



Dates of Session:				Class Name:				
Day of Week:				Session:				Site: DCW Transactional- CENTER 1
Child Name	**Grade**	**Parent Name**	**Parent Cell**	**Parent Email**	**Parent 2 Name**	**Parent 2 Cell**	**Parent 2 Email**	**Attendance**
Alice Wonderland	Kindergarten	Jane Wonderland			Frank Wonderland			
Alice Wonderland	Kindergarten	Jane Wonderland			Frank Wonderland			
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	
Anna Frozen		Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com	

- Current Roster v2 - Excel



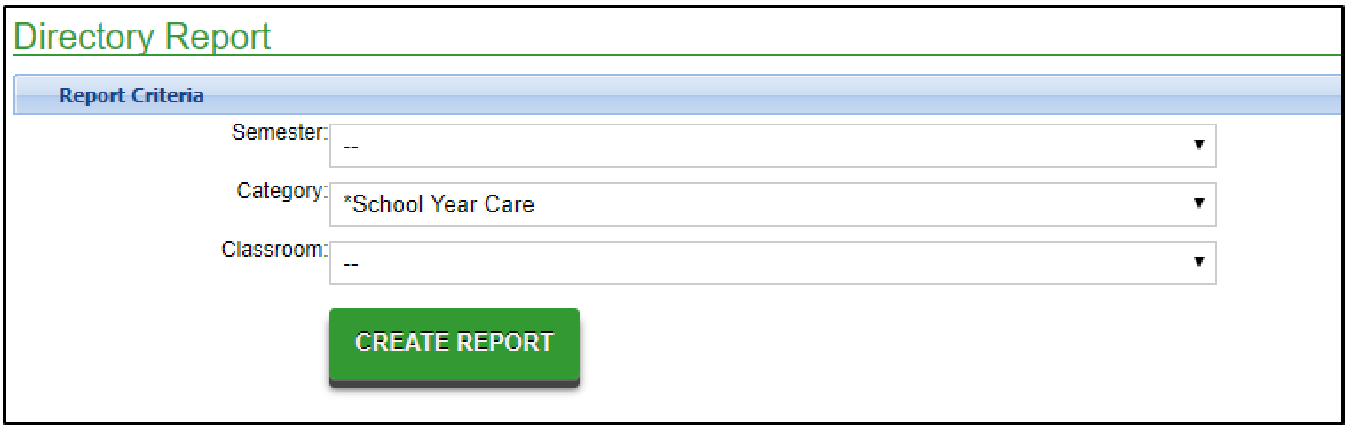
Current Roster										
October 30 -- October 30, 2018										
Center	**Category**	**Program**	**Student Name**	**Grade**	**Schedule Start D**	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
DCW Transactional- CENTER 1		A Center Level Room	Bilbo Baggins	KG	10/01/18	X	X	X	X	X
TOTAL			**1**			**1**	**1**	**1**	**1**	**1**
DCW Transactional- CENTER 1	*School Year Care	AM, Before School Care	Bilbo Baggins	KG	07/01/18	X	X		X	X
DCW Transactional- CENTER 1	*School Year Care	AM, Before School Care	Frodo Baggins		07/01/18	X	X	X		
DCW Transactional- CENTER 1	*School Year Care	AM, Before School Care	Merida Brave		09/01/18	X	X	X		X
DCW Transactional- CENTER 1	*School Year Care	AM, Before School Care	test Baggins		10/19/18	X	X	X	X	X
DCW Transactional- CENTER 1	*School Year Care	Flexible Care, AM	Anna Frozen		08/27/18	X	X	X	X	X
DCW Transactional- CENTER 1	*School Year Care	Flexible Care, AM	Eliza Doolittle		08/27/18	X	X	X	X	X
DCW Transactional- CENTER 1	*School Year Care	Flexible Care, Full Day	Stephanie Brown		10/28/18			X		
DCW Transactional- CENTER 1	*School Year Care	Flexible Care, PM	Merida Brave		07/01/18	X	X	X	X	
DCW Transactional- CENTER 1	*School Year Care	Flexible Child Care Registration	Stephanie Brown		10/15/18					
DCW Transactional- CENTER 1	*School Year Care	Registration Room - Tammy	Anna Frozen		07/01/18	X	X	X	X	X
DCW Transactional- CENTER 1	*School Year Care	Registration Room - Tammy	New Child	PRE	07/01/18					
DCW Transactional- CENTER 1	*School Year Care	Tammy Parent Managed Room	Anna Frozen		07/02/18	X	X	X	X	X
DCW Transactional- CENTER 1	*School Year Care	Tammy Parent Managed Room	Anna Frozen		07/01/18	X	X	X	X	X
DCW Transactional- CENTER 1	*School Year Care	Tammy Parent Managed Room	New Child	PRE	10/28/18	X	X	X		
DCW Transactional- CENTER 1	*School Year Care	Tammy Parent Managed Room	New Child	PRE	07/01/18					
TOTAL			**15**			**11**	**11**	**11**	**8**	**8**
DCW Transactional- CENTER 1	Special Programs	After School - PMC Registration	Stephanie Test	PRE	09/12/18					
DCW Transactional- CENTER 1	Special Programs	After School - PMC Registration	Test Test	PRE	07/01/18					
DCW Transactional- CENTER 1	Special Programs	Chess, Fall Session	Bilbo Baggins	KG	10/02/17	X		X	X	X
TOTAL			**3**			**1**	**0**	**1**	**1**	**1**
DCW Transactional- CENTER 1	Summer Camp	Full Day Summer Hourly	Bilbo Baggins	KG	05/28/18	X	X	X	X	X
TOTAL			**1**			**1**	**1**	**1**	**1**	**1**

Teacher/Staff Portal - Directory

Last Modified on 12/04/2018 10:46 am EST

The Directory tile allows staff to run reports based on semester, category, and/or classroom.

1. Select the report criteria



Directory Report

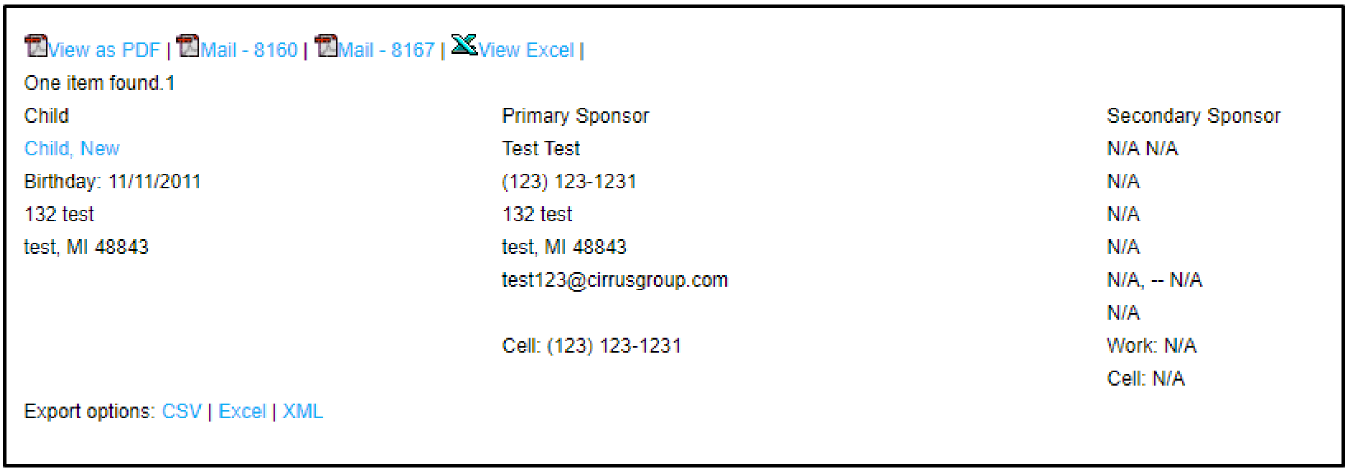
Report Criteria

Semester: --

Category: *School Year Care

Classroom: --

2. Click Create Report

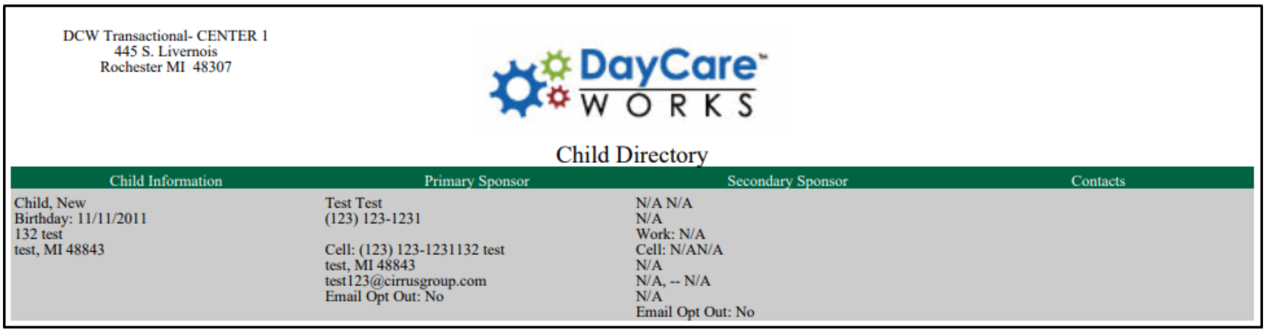


One item found.1

Child	Primary Sponsor	Secondary Sponsor
Child, New Birthday: 11/11/2011 132 test test, MI 48843	Test Test (123) 123-1231 132 test test, MI 48843 test123@cirrusgroup.com Cell: (123) 123-1231	N/A N/A N/A N/A N/A N/A, -- N/A N/A Work: N/A Cell: N/A

Export options: CSV | Excel | XML

3. View the plain text data below or select a format to view
   - View as PDF



DCW Transactional- CENTER 1
445 S. Livernois
Rochester MI 48307

Child Directory

Child Information	Primary Sponsor	Secondary Sponsor	Contacts
Child, New Birthday: 11/11/2011 132 test test, MI 48843	Test Test (123) 123-1231 Cell: (123) 123-1231132 test test, MI 48843 test123@cirrusgroup.com Email Opt Out: No	N/A N/A N/A Work: N/A Cell: N/AN/A N/A N/A, -- N/A N/A Email Opt Out: No	

   - Mail - 8160 - mailing label

Henry Doolittle
1234 FLOWER WAY
LONDON, MI 48309

  - Mail - 8167 - coming soon
  - View Excel

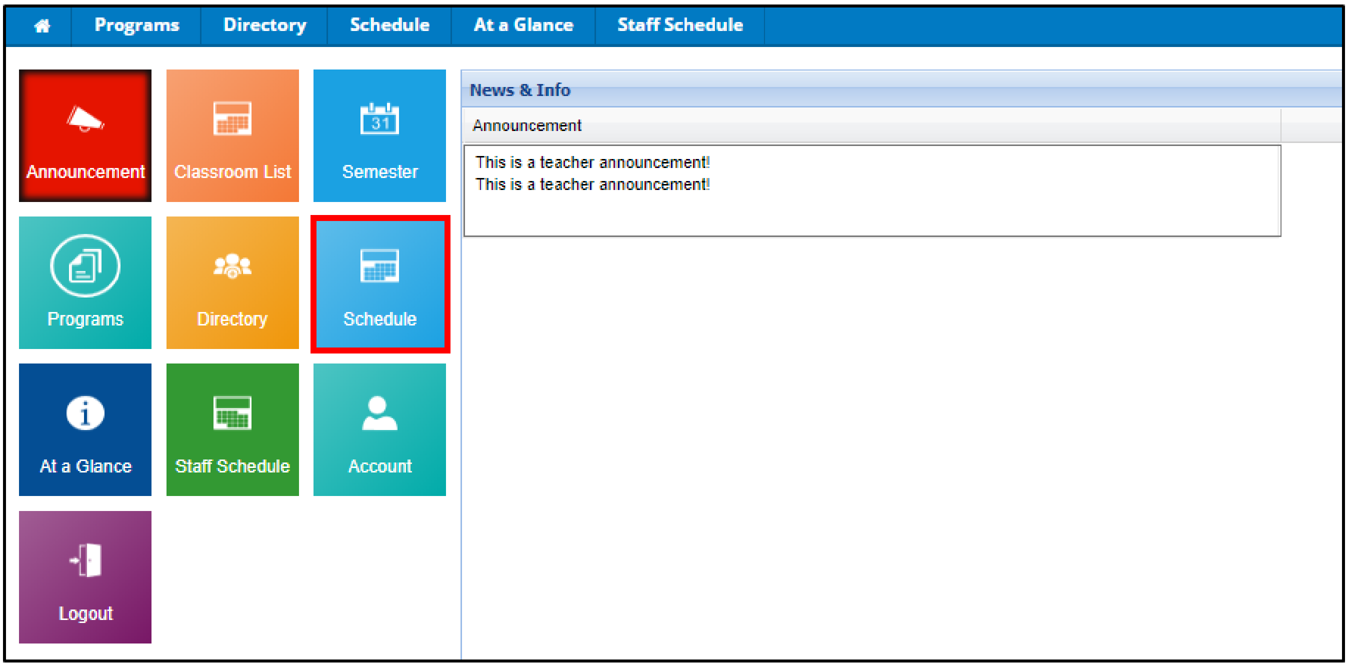
4. Or use the Export Options below the student data
    - CSV
    - Excel
    - XML

Teacher/Staff Portal - Schedule

Last Modified on 12/04/2018 10:38 am EST

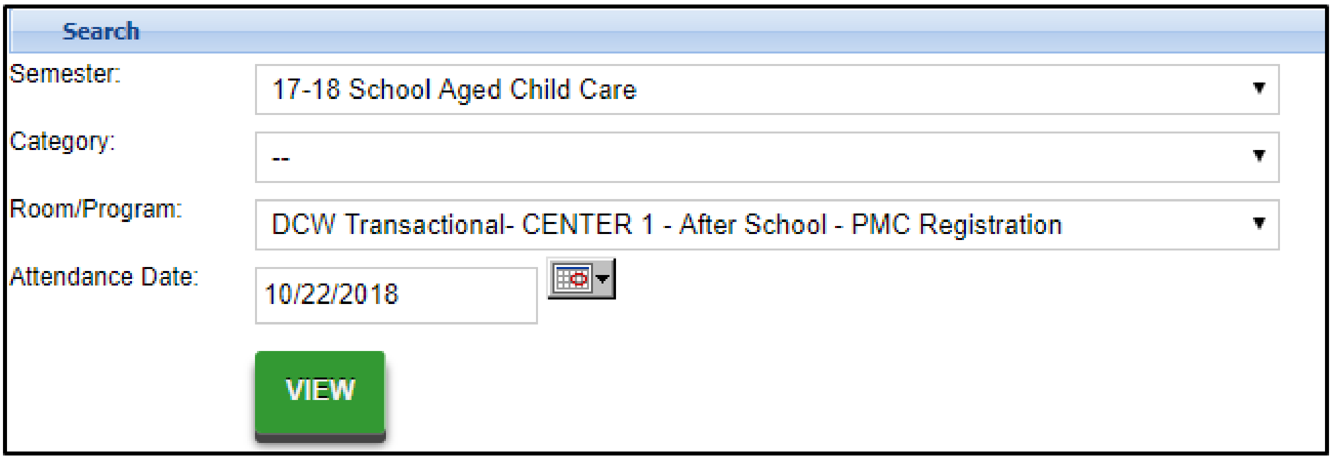
The schedule tile on the teacher/staff portal allows staff to take student attendance.

1. From the portal home screen, click Schedule



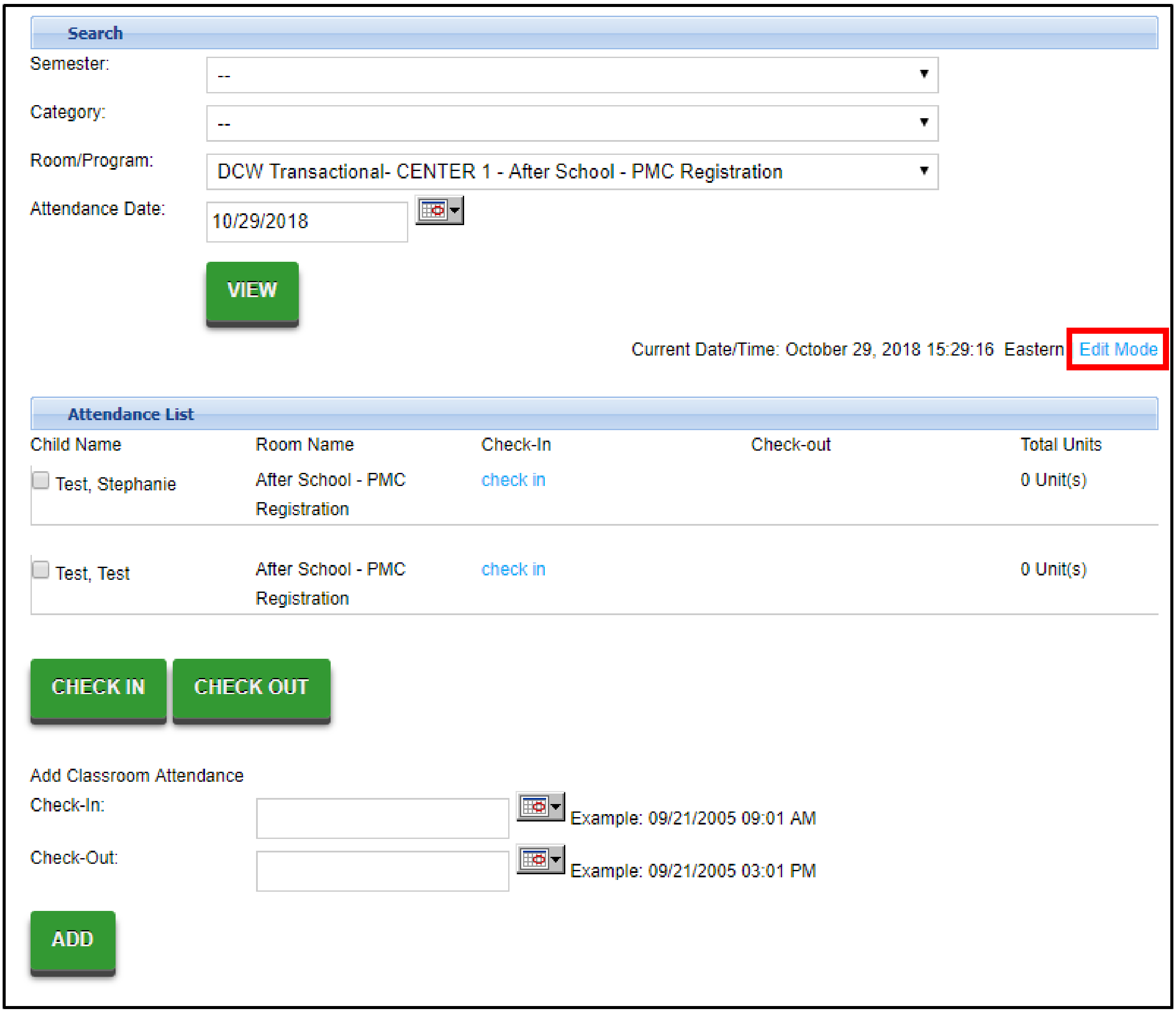
This is a teacher announcement!
This is a teacher announcement!

2. To search for attendance, use the Search section to filter. Then click View



Semester: 17-18 School Aged Child Care
Category: --
Room/Program: DCW Transactional- CENTER 1 - After School - PMC Registration
Attendance Date: 10/22/2018

3. To enter attendance, click Select Edit Mode



Search

Semester: --

Category: --

Room/Program: DCW Transactional- CENTER 1 - After School - PMC Registration

Attendance Date: 10/29/2018

Current Date/Time: October 29, 2018 15:29:16 Eastern

Attendance List

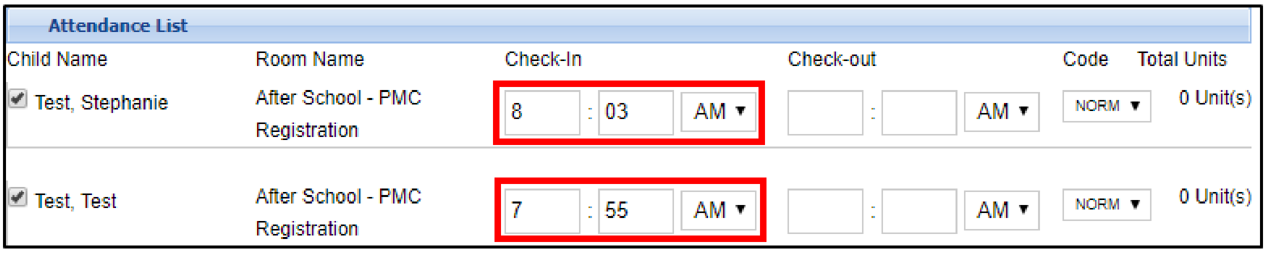
Child Name	Room Name	Check-In	Check-out	Total Units
☐ Test, Stephanie	After School - PMC Registration	check in		0 Unit(s)
☐ Test, Test	After School - PMC Registration	check in		0 Unit(s)

Add Classroom Attendance

Check-In: Example: 09/21/2005 09:01 AM

Check-Out: Example: 09/21/2005 03:01 PM

4. Enter the Check-In and/or Check-Out times for students
    - If account for missing or absent students, be sure to select the correct attendance code from the Code drop-down



Attendance List

Child Name	Room Name	Check-In	Check-out	Code	Total Units
☑ Test, Stephanie	After School - PMC Registration	8 : 03 AM	: AM	NORM	0 Unit(s)
☑ Test, Test	After School - PMC Registration	7 : 55 AM	: AM	NORM	0 Unit(s)

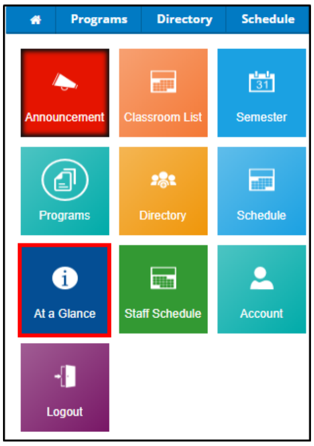
5. Click Save
    - Once students are checked in or out, it will show the time and the name of the staff member who entered it

Teacher/Staff Portal - At a Glance

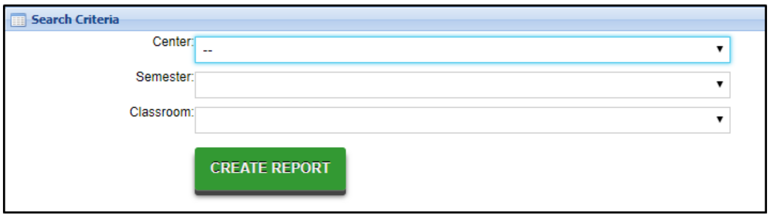
Last Modified on 12/04/2018 10:33 am EST

The At a Glance tile within the teacher/staff portal allows staff to pull a report with center, semester, classroom, and student information.

1. From the teacher/staff portal home screen, click At a Glance



2. Enter the Search Criteria - using no criteria will pull all centers, semesters, and classrooms

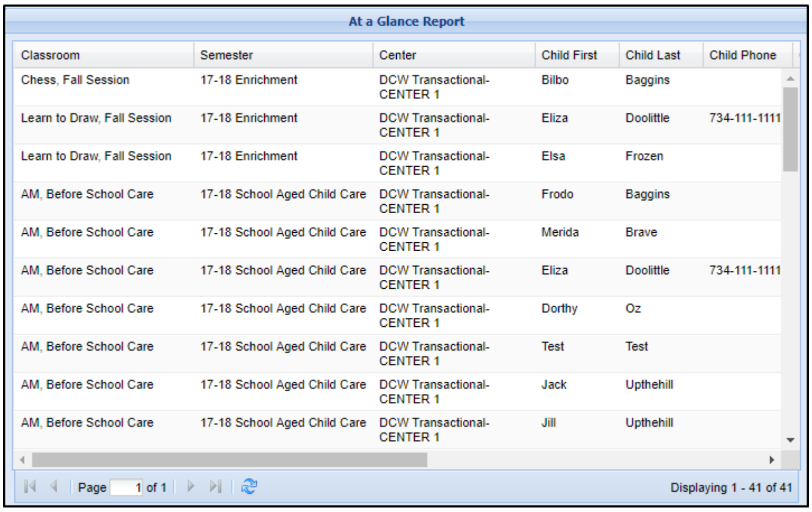


Center: --
Semester:
Classroom:

   - Center
   - Semester
   - Classroom

3. Click Create Report

4. The following will be displayed:



At a Glance Report

Classroom	Semester	Center	Child First	Child Last	Child Phone
Chess, Fall Session	17-18 Enrichment	DCW Transactional-CENTER 1	Bilbo	Baggins	
Learn to Draw, Fall Session	17-18 Enrichment	DCW Transactional-CENTER 1	Eliza	Doolittle	734-111-1111
Learn to Draw, Fall Session	17-18 Enrichment	DCW Transactional-CENTER 1	Elsa	Frozen	
AM, Before School Care	17-18 School Aged Child Care	DCW Transactional-CENTER 1	Frodo	Baggins	
AM, Before School Care	17-18 School Aged Child Care	DCW Transactional-CENTER 1	Merida	Brave	
AM, Before School Care	17-18 School Aged Child Care	DCW Transactional-CENTER 1	Eliza	Doolittle	734-111-1111
AM, Before School Care	17-18 School Aged Child Care	DCW Transactional-CENTER 1	Dorthy	Oz	
AM, Before School Care	17-18 School Aged Child Care	DCW Transactional-CENTER 1	Test	Test	
AM, Before School Care	17-18 School Aged Child Care	DCW Transactional-CENTER 1	Jack	Upthehill	
AM, Before School Care	17-18 School Aged Child Care	DCW Transactional-CENTER 1	Jill	Upthehill	

Page 1 of 1

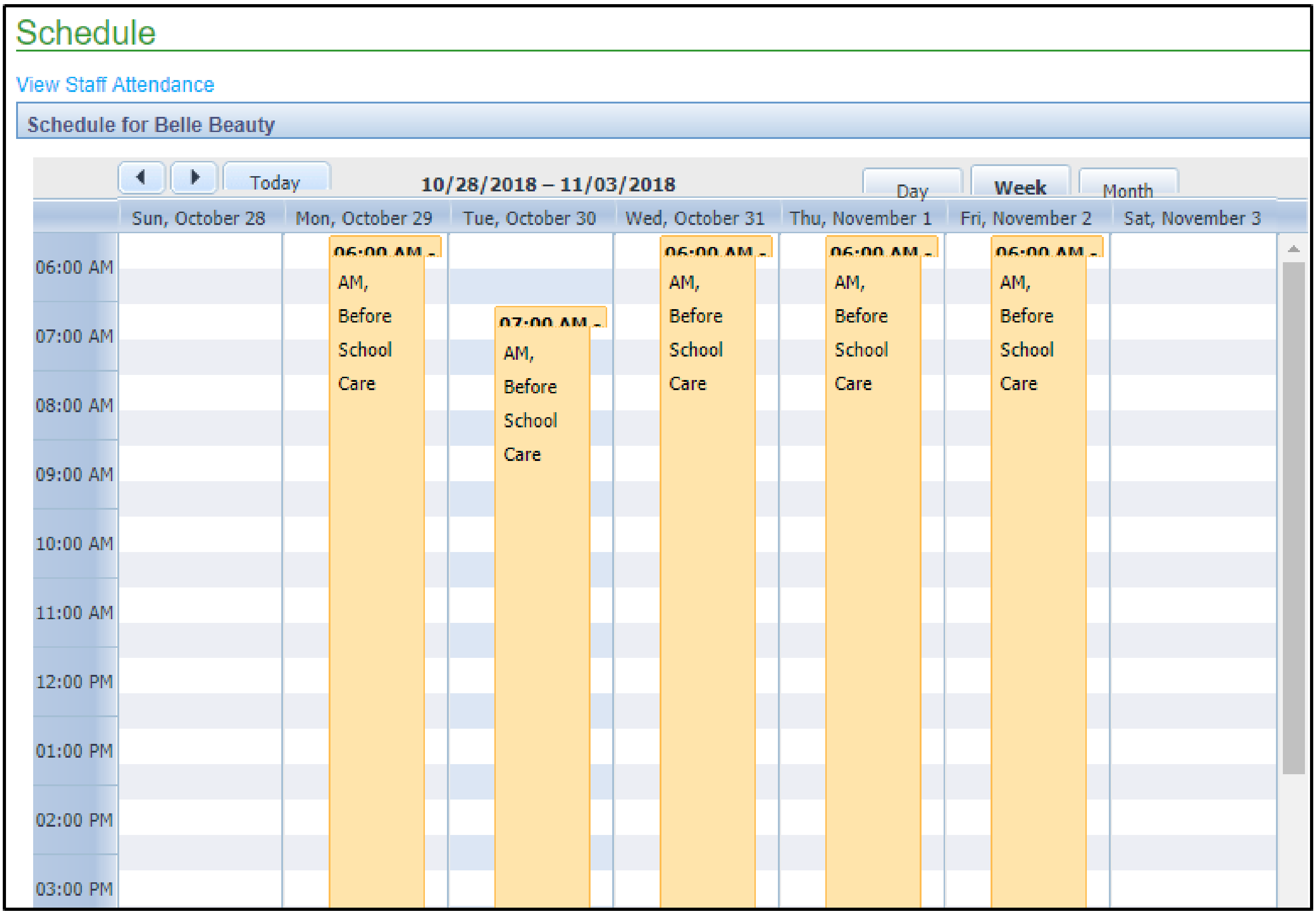
Displaying 1 - 41 of 41

  - Classroom
  - Semester
  - Center
  - Student name
  - Student Phone
  - Guardian Information

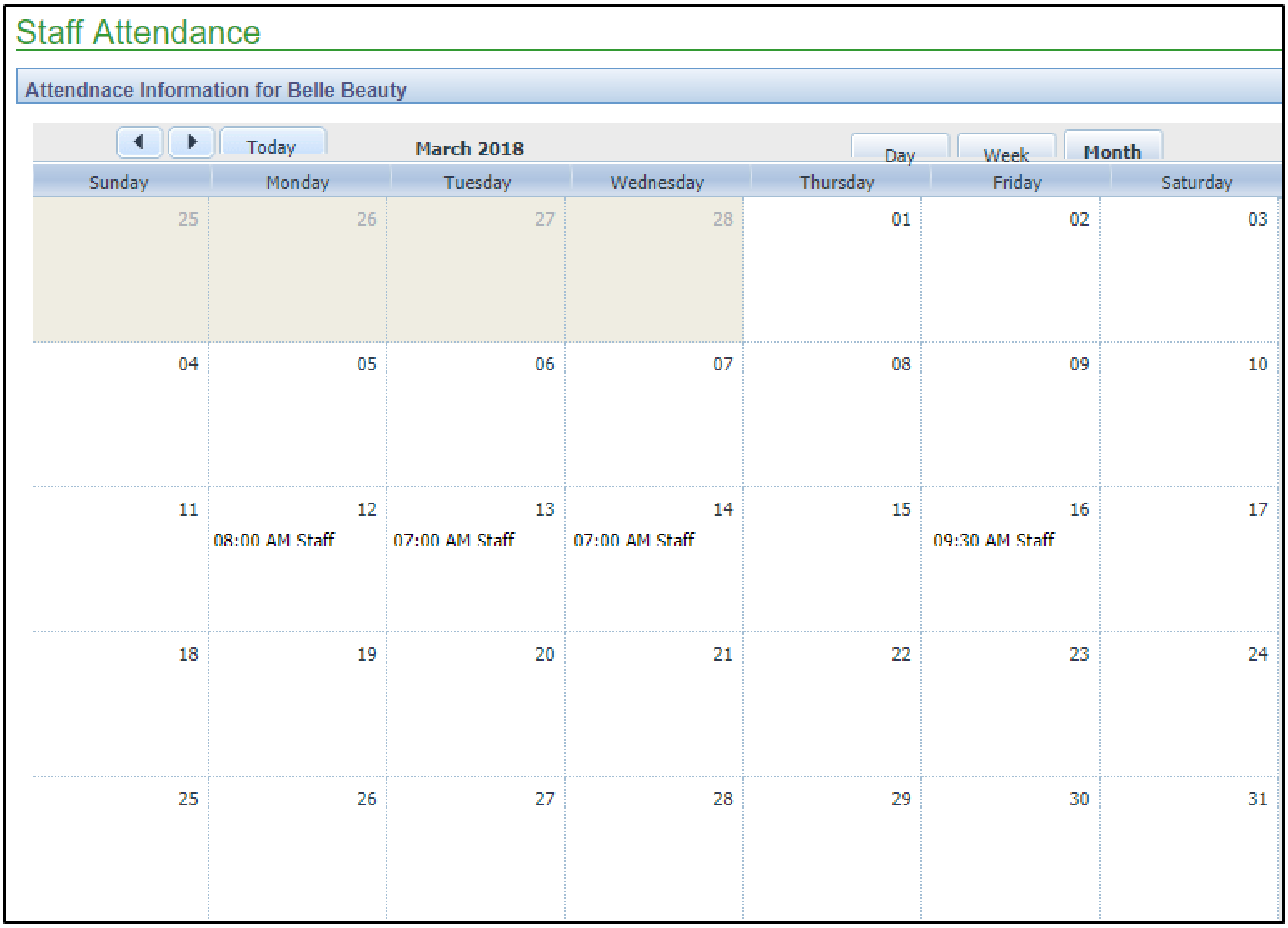
Teacher/Staff Portal - Staff Schedule

Last Modified on 11/02/2018 1:55 pm EDT

The Staff Schedule tile allows staff members to view their schedule by day, week, or month



Staff can also view their attendance by clicking View Staff Attendance



Staff Attendance

Attendnace Information for Belle Beauty

March 2018

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	01	02	03
04	05	06	07	08	09	10
11	12 08:00 AM Staff	13 07:00 AM Staff	14 07:00 AM Staff	15	16 09:30 AM Staff	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

How do I request a new feature?

Last Modified on 12/21/2018 4:01 pm EST

To request a feature or enhancement login to the Care portal (https://care.cirrusgroup.com/) and create a ticket.

Be sure to include a mockup of what the feature or enhancement would look like, date expectations, and a full description of the feature/request. When submitting requests please be sure to add as much detail as possible- screenshots and descriptions.

You will receive communication if the request has not been approved.

If the request has been approved we will respond with a Statement of Work (SOW) and pricing detail. Once the SOW has been signed and returned the feature will flow through our regular development cycle.

How do I report a problem or issue I am experiencing?

Last Modified on 12/21/2018 4:00 pm EST

To report an issue or request assistance please add a ticket to our Care portal (https://care.cirrusgroup.com/) and one of our support representatives will respond as soon as possible.

How do I request training?

Last Modified on 12/21/2018 4:02 pm EST

To request training please add a ticket to our Care portal (https://care.cirrusgroup.com/) and be sure to mark the request with the category of "Training Requests".

When entering the request into the system, please include the following information:

- Training topic
- Time frame for training
- Users who would be attending

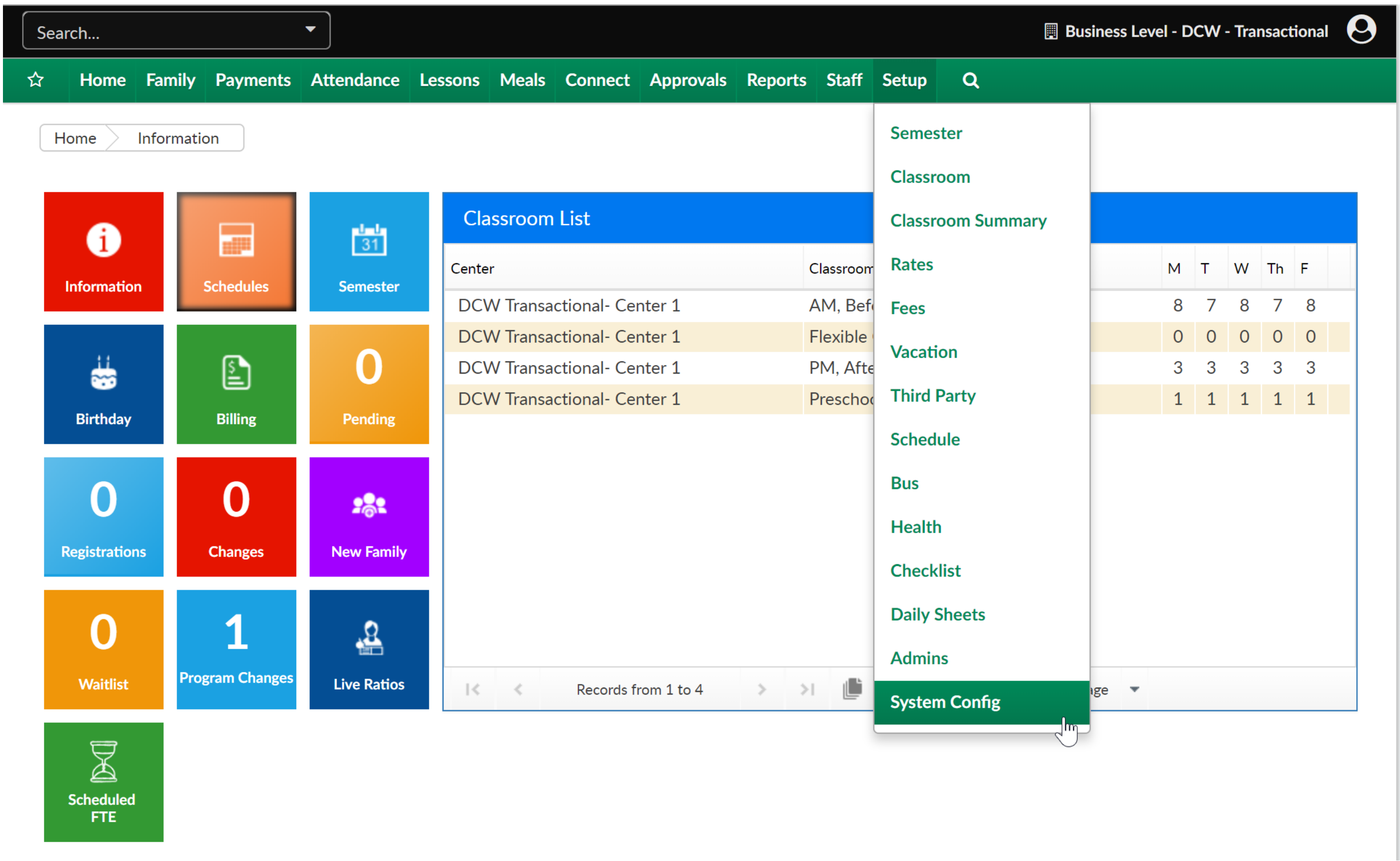
Billing- Is my site transactional or defined?

Last Modified on 06/26/2018 1:45 pm EDT

Each site is set up as transactional or defined billing, this will relate to how a site is able to bill their families.

- Defined billing means a site will only ever bill one period at a time, the nice feature of defined billing is that billing can be recreated in the current period so any rate changes or new discounts will be added to the family statement without having to create a manual debit or credit
- Transactional billing means a site will have the ability to bill multiple billing periods and types without major restriction. Typically if changes are made for a child's program/room assignment (rate or discount) after billing occurs the addition or subtraction will have to occur through creating a manual credit/debit on the family's financial ledger.

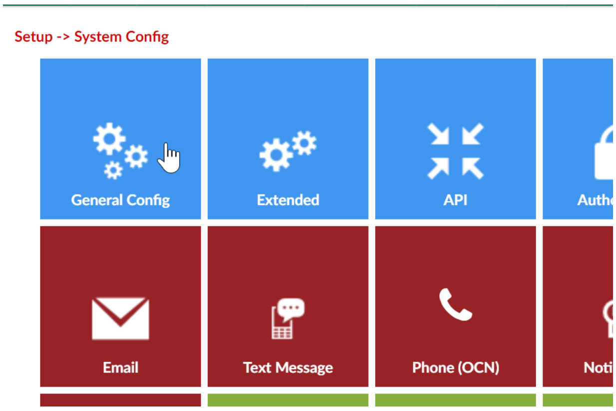
To see which type of site you have go to Setup > System Config



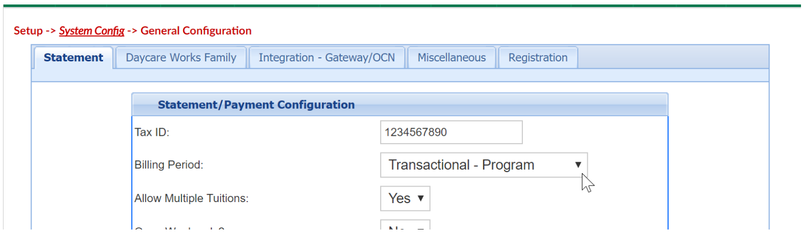
Classroom List

Center	Classroom	M	T	W	Th	F
DCW Transactional- Center 1	AM, Bef	8	7	8	7	8
DCW Transactional- Center 1	Flexible	0	0	0	0	0
DCW Transactional- Center 1	PM, Afte	3	3	3	3	3
DCW Transactional- Center 1	Preschoo	1	1	1	1	1

Then select the General Config option



The billing type that has been set will display in the Billing Period field.



Statement/Payment Configuration

Tax ID: 1234567890

Billing Period: Transactional - Program

Allow Multiple Tuitions: Yes

Once billing has been created the type of billing can no longer be changed or updated.

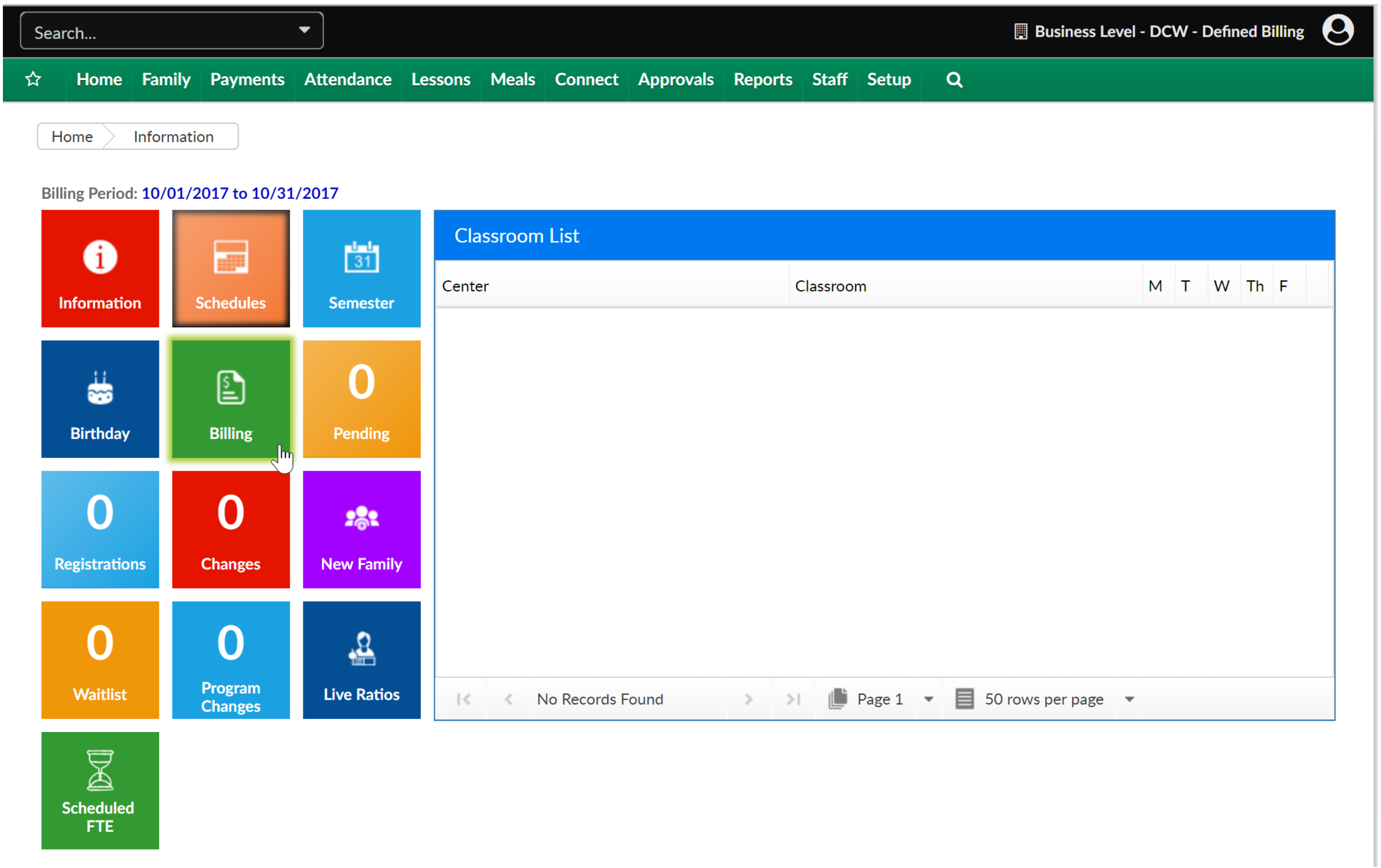
Billing- How do I run defined billing?

Last Modified on 06/26/2018 1:49 pm EDT

Billing can be created from the business level or a specific center level. There are two types of billing methods- defined and transactional. Follow this link for directions to find out the differences between the billing types.

Defined billing means that there is only one type of billing that will ever be created by a site- weekly or monthly. Defined billing can only run for one period at a time, this means that if billing is processed for the current week or month, as soon as billing is created for the next month, the current month can no longer be updated.

To create or run a billing go to the Home > Information screen, then select the Billing tile.



Billing Period: 10/01/2017 to 10/31/2017

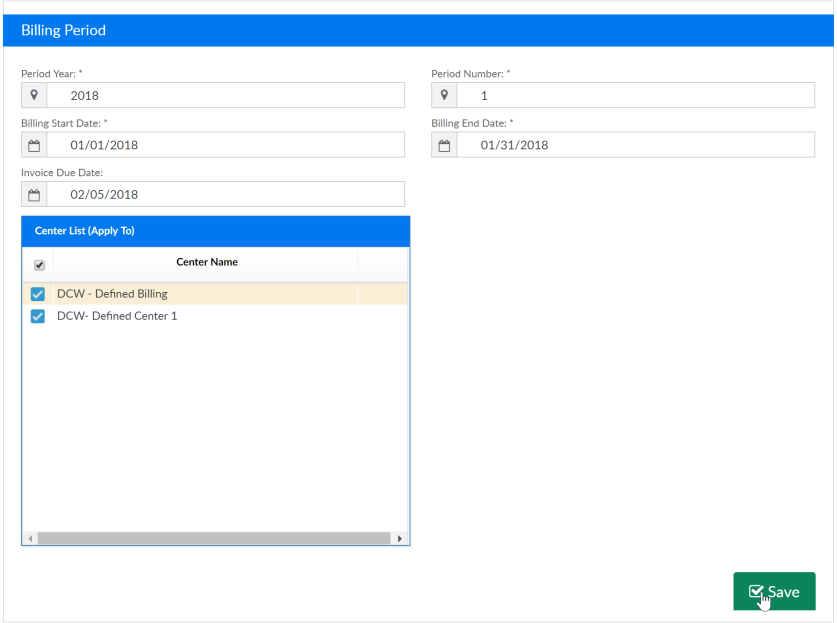
No Records Found

Enter the below detail to create a new billing cycle, then press save.

- Billing Year- enter the current fiscal year
- Period Number- enter the period number (this typically should be the week

number or the month number) this number has to be unique for the billing year

- Billing Start Date- enter the start date of your billing period (this date must not overlap with another period already in the system)
- Billing End Date- enter the end date of your billing period (this date must not overlap with another period already in the system)
- Invoice Due Date- enter the date should be paid by
- Center List (Apply to)- select the centers that should be applied to the billing cycle being created



Period Year: * 2018

Period Number: * 1

Billing Start Date: * 01/01/2018

Billing End Date: * 01/31/2018

Invoice Due Date: 02/05/2018

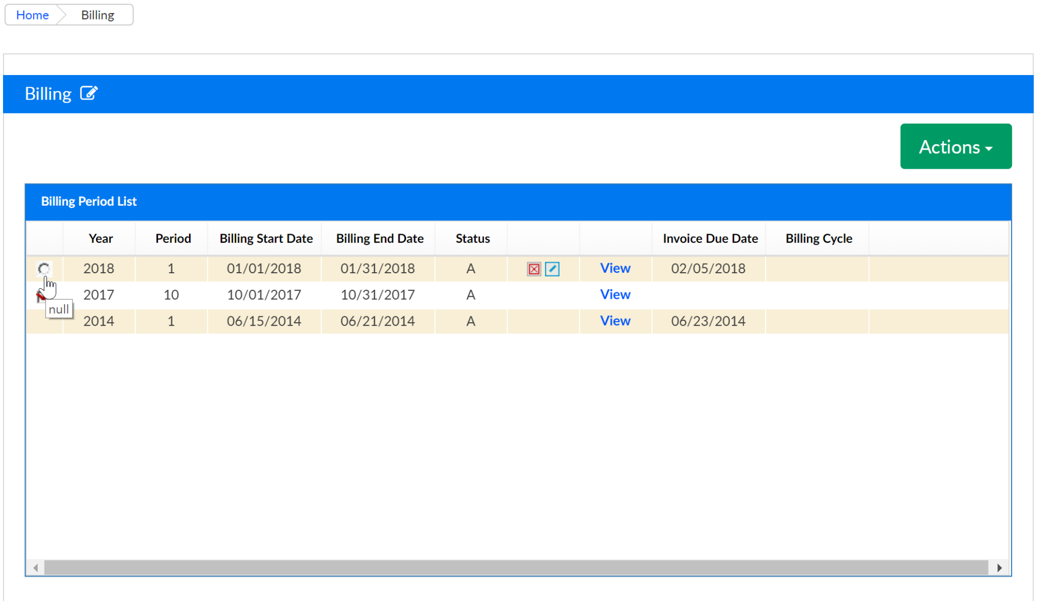
Center List (Apply To)

☑	Center Name
☑	DCW - Defined Billing
☑	DCW- Defined Center 1

To set the period as active click the radio button on the left hand side of the billing cycle names. There can only be one active cycle per center, as soon as you set a cycle to active the last cycle can no longer be recreated and the new cycle can no longer be edited.

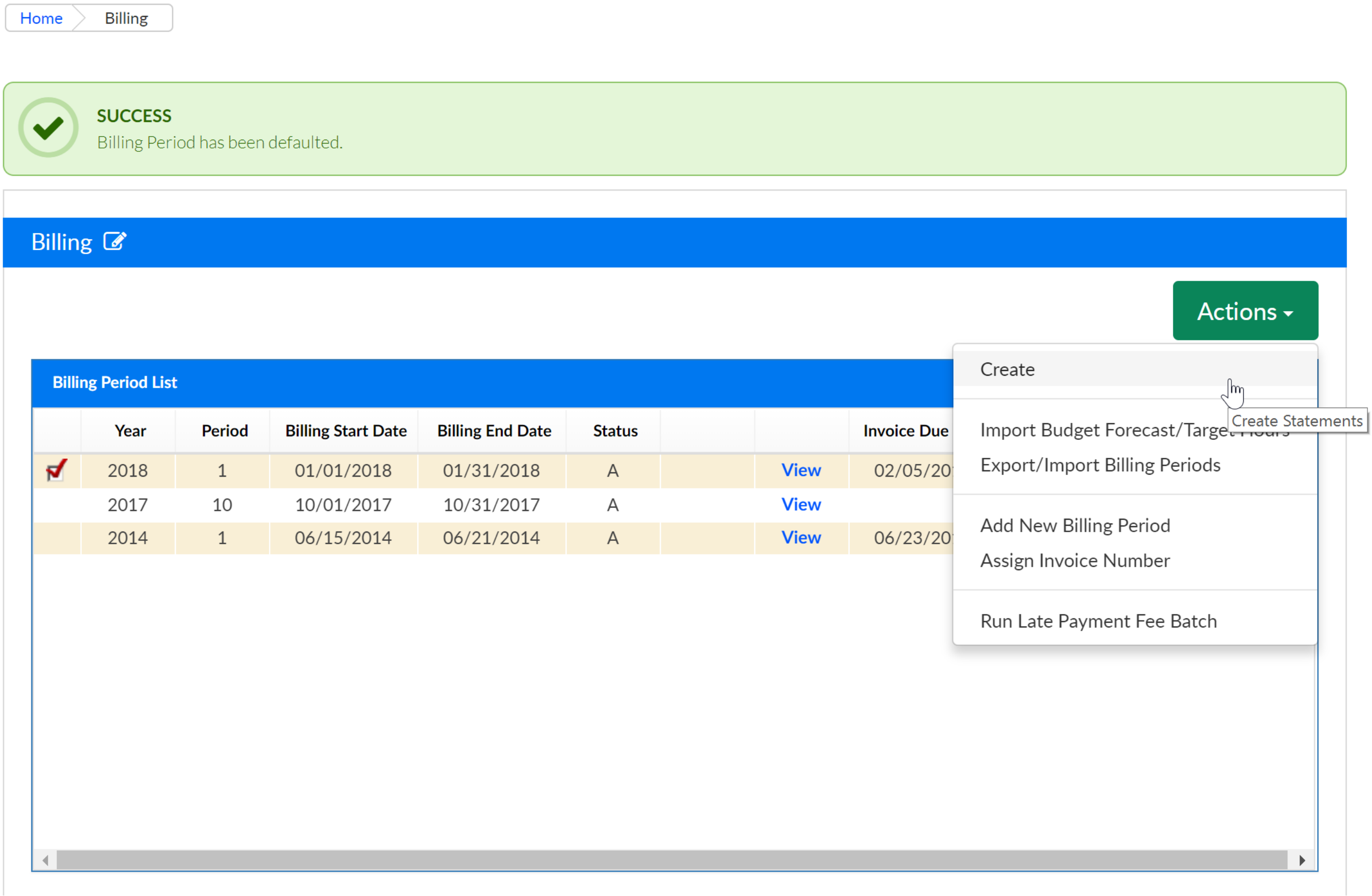
To delete a cycle that hasn't been marked as active yet, select the red x icon.

To edit a cycle that hasn't been marked as active yet, select the edit icon.



	Year	Period	Billing Start Date	Billing End Date	Status			Invoice Due Date	Billing Cycle
○	2018	1	01/01/2018	01/31/2018	A	☒	View	02/05/2018	
	2017	10	10/01/2017	10/31/2017	A		View		
	2014	1	06/15/2014	06/21/2014	A		View	06/23/2014	

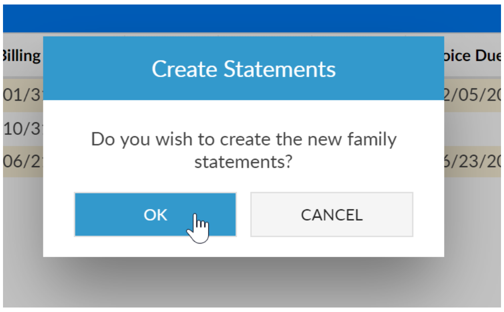
Once your billing cycle has been set to active, go to the Actions menu and select the Create option.



SUCCESS
Billing Period has been defaulted.

	Year	Period	Billing Start Date	Billing End Date	Status			Invoice Due
✓	2018	1	01/01/2018	01/31/2018	A		View	02/05/20
	2017	10	10/01/2017	10/31/2017	A		View	
	2014	1	06/15/2014	06/21/2014	A		View	06/23/20

Press OK to continue. The system will process and families will be charged based on their child's program/room assignment.



Create Statements

Do you wish to create the new family statements?

Once billing has been created invoices can be sent from the Payments > Outstanding screen.

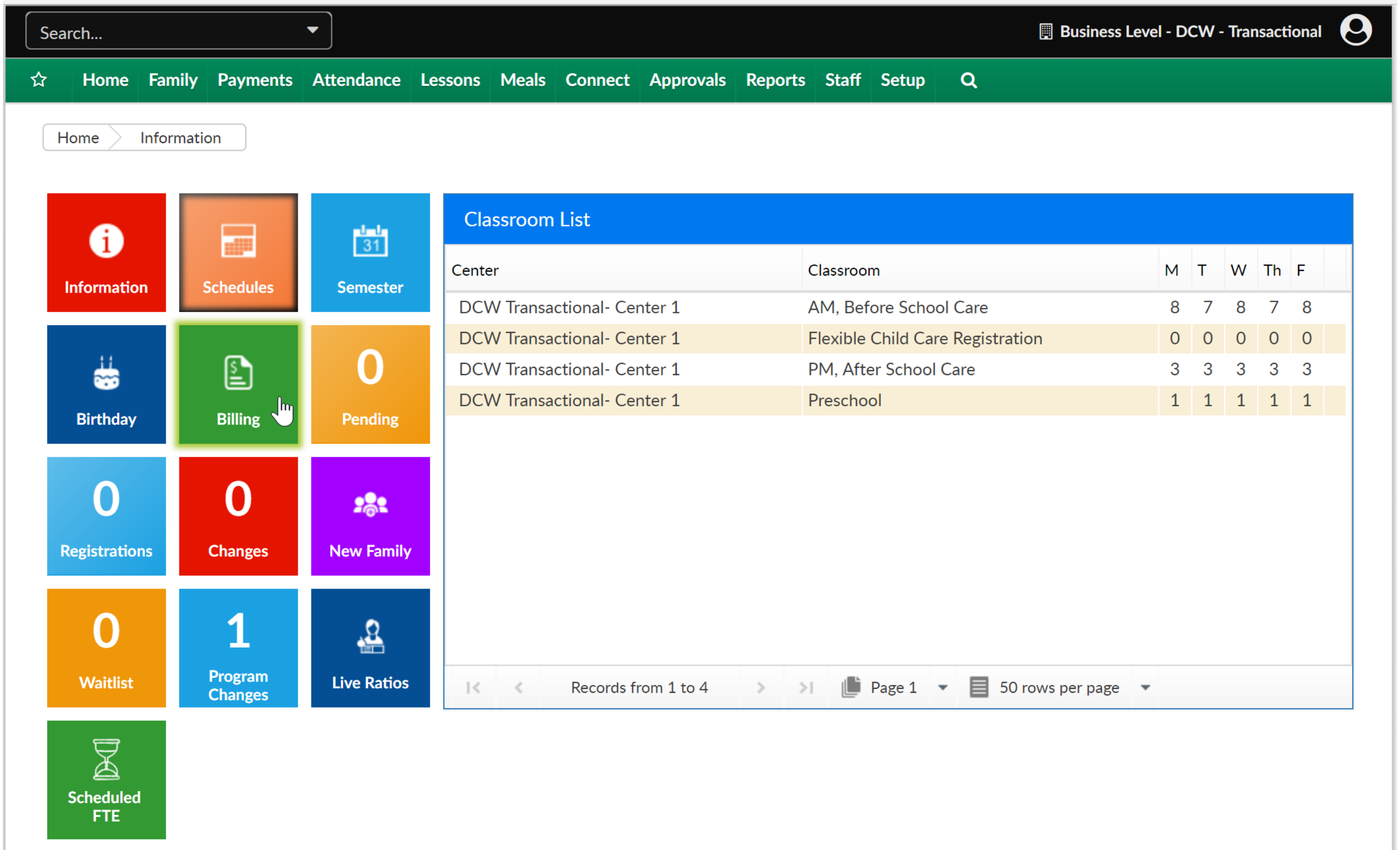
Billing- How do I run transactional billing?

Last Modified on 06/26/2018 1:51 pm EDT

Billing can be created from the business level or a specific center level. There are two types of billing methods- defined and transactional. Follow this link for directions to find out the differences between the billing types.

Transactional billing will allow users to run billing for future periods and different billing cycles. This means that admins can select the post date, time frame and category that will be billed. If new children register for a program, billing for the same exact period can be created- any children that had already been billed for the selected settings will not bill again.

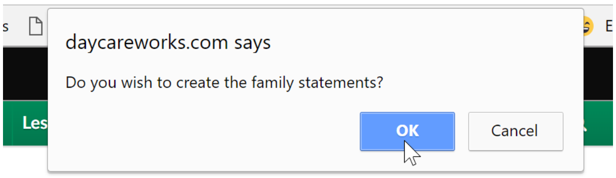
From the Home > Information screen select the billing box.



Classroom List

Center	Classroom	M	T	W	Th	F
DCW Transactional- Center 1	AM, Before School Care	8	7	8	7	8
DCW Transactional- Center 1	Flexible Child Care Registration	0	0	0	0	0
DCW Transactional- Center 1	PM, After School Care	3	3	3	3	3
DCW Transactional- Center 1	Preschool	1	1	1	1	1

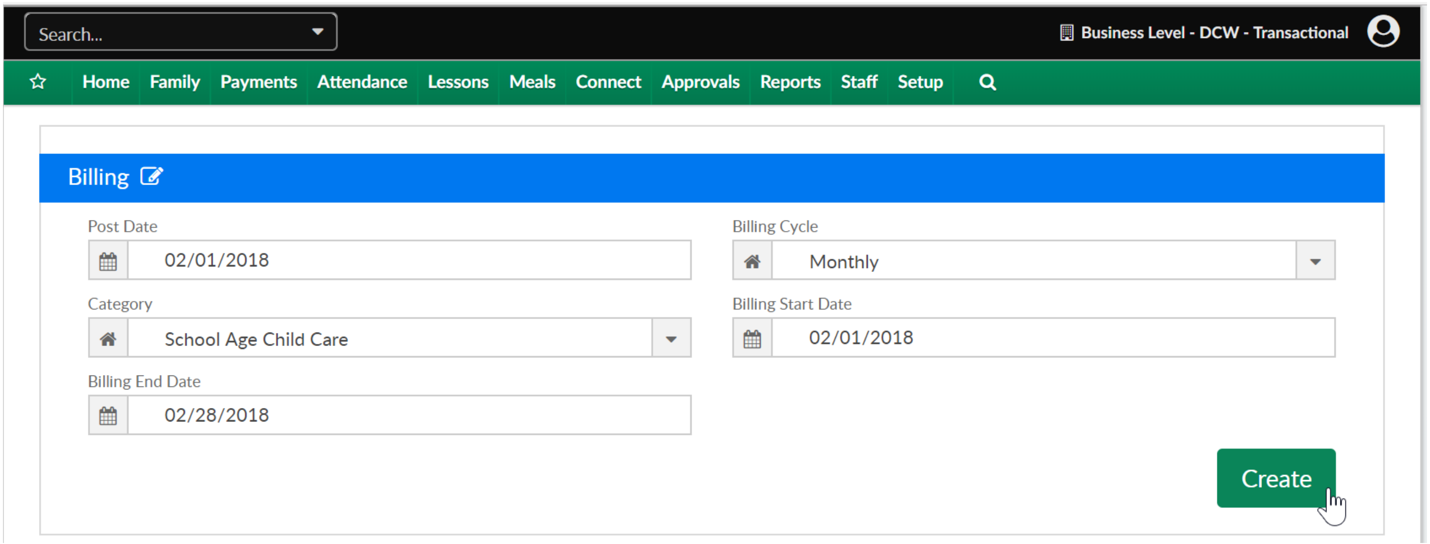
When the confirmation box opens, select OK to continue to the billing screen.


daycareworks.com says

Do you wish to create the family statements?

On the billing screen enter the below information, then press Create.

- Post Date- the date the billing will show as posted on (this should typically be the same as the billing start date)
- Billing Cycle- the frequency being billed- this is set at the room/program level on the setup > classroom/room screen
- Category- the category of room/programs that will bill out
- Billing Start Date- the start of the billing period
- Billing End Date- the end of the billing period



Post Date: 02/01/2018

Billing Cycle: Monthly

Category: School Age Child Care

Billing Start Date: 02/01/2018

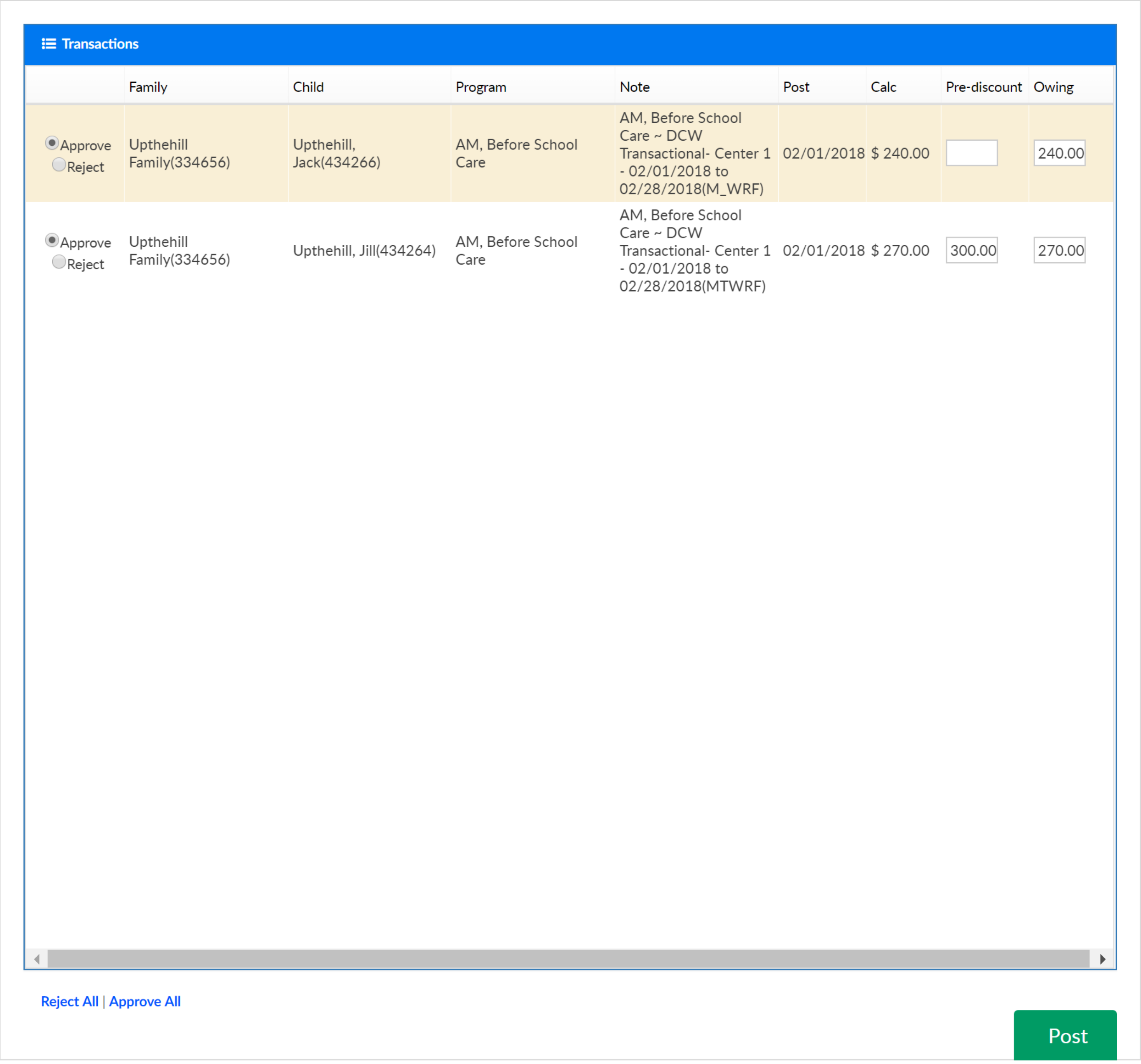
Billing End Date: 02/28/2018

The system will process, this may take a few moments.

Once the process completes pending billing detail will display in the Transactions box. Each line will display the below detail:

- Approve or Reject- if a line is rejected for a child, the child will need to be manually billed for the period, the child will not display again if billing is posted and their record was rejected
- Family name & ID
- Child name & ID
- Room/Program detail

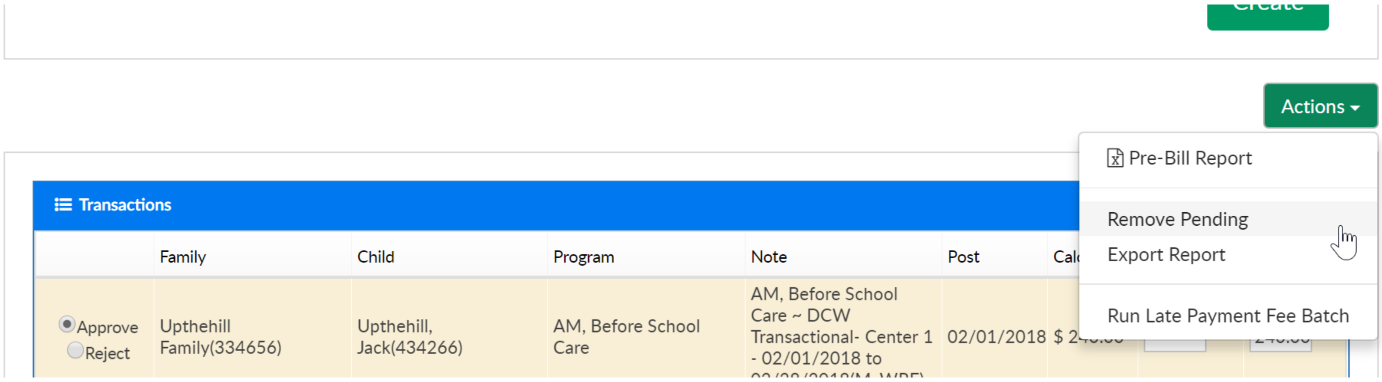
- Note detail that will print on the family statement
- Post Date
- Calc- the amount of the charge that will post
- Pre-discount- the original amount of the charge before discount
- Owing- total amount that will display as due on the family ledger
    - If changes need to be made for what will bill update the Owing field to the total amount you want to charge for this period only



Transactions

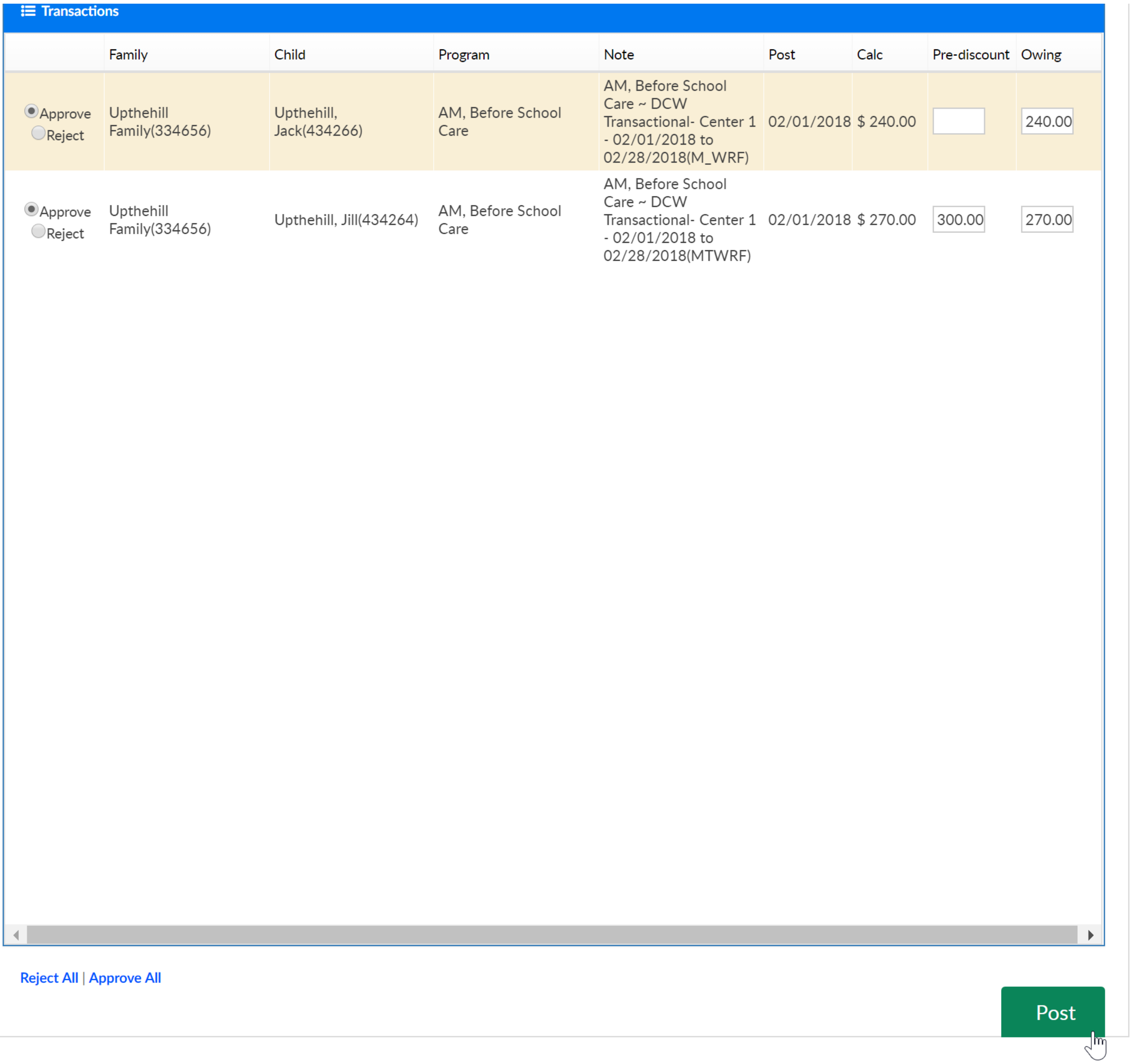
	Family	Child	Program	Note	Post	Calc	Pre-discount	Owing
● Approve ○ Reject	Upthehill Family(334656)	Upthehill, Jack(434266)	AM, Before School Care	AM, Before School Care ~ DCW Transactional- Center 1 - 02/01/2018 to 02/28/2018(M_WRF)	02/01/2018	$ 240.00		240.00
● Approve ○ Reject	Upthehill Family(334656)	Upthehill, Jill(434264)	AM, Before School Care	AM, Before School Care ~ DCW Transactional- Center 1 - 02/01/2018 to 02/28/2018(MTWRF)	02/01/2018	$ 270.00	300.00	270.00

If changes need to be made before posting, go to Actions and select Remove Pending, go back to the children's program/room assignments and make changes as necessary. Once changes have been made come back to this screen and re-run billing.



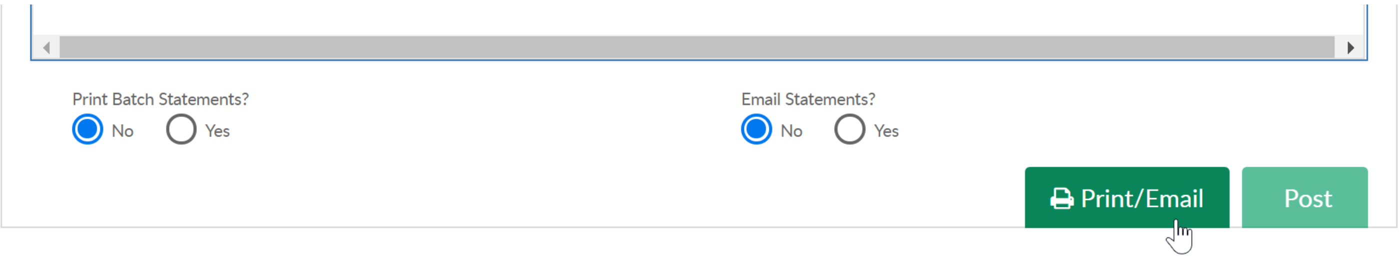
	Family	Child	Program	Note	Post	Calc
● Approve ○ Reject	Upthehill Family(334656)	Upthehill, Jack(434266)	AM, Before School Care	AM, Before School Care ~ DCW Transactional- Center 1 - 02/01/2018 to	02/01/2018	$ 2

If billing is correct, scroll to the bottom of the page and press the Post button- this will add the displayed charges to the family's financial ledger and show as due.



	Family	Child	Program	Note	Post	Calc	Pre-discount	Owing
● Approve ○ Reject	Upthehill Family(334656)	Upthehill, Jack(434266)	AM, Before School Care	AM, Before School Care ~ DCW Transactional- Center 1 - 02/01/2018 to 02/28/2018(M_WRF)	02/01/2018	$ 240.00		240.00
● Approve ○ Reject	Upthehill Family(334656)	Upthehill, Jill(434264)	AM, Before School Care	AM, Before School Care ~ DCW Transactional- Center 1 - 02/01/2018 to 02/28/2018(MTWRF)	02/01/2018	$ 270.00	300.00	270.00

To print batch statements press Yes, to email statements, select yes- then press Print/Email-



Print Batch Statements?

● No ○ Yes

Email Statements?

● No ○ Yes

We often suggest to not send statements from this page as a site may just be posting by category. Instead once all billing has been created for the period go to the Payments > Outstanding and send the statement to selected families.

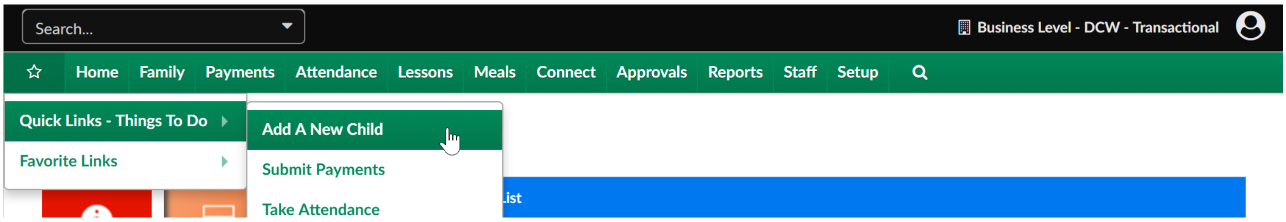
Family- Adding a New Family to a Site/Center

Last Modified on 05/30/2018 2:23 pm EDT

Families/New Children can be added to a center/site several ways.

1. Through the center's new registration page- parents/guardians must add all detail and submit payment (in most cases) before their submission is sent to the center. The family would be approved into the center by a staff or admin user from the Home > Information, Registration tile or the Approval > Registration menu option.
2. Once a family is in the system for a school, the option to allow parents to add new children can be enabled on the family portal (connect.schoolcareworks.com or family.daycareworks.com). One the child's detail is entered into the system the child will need to be approved into the system from the Approval > Child screen .
3. The family or child can be added to the system from the admin side of the system (schoolcareworks.com or daycareworks.com).

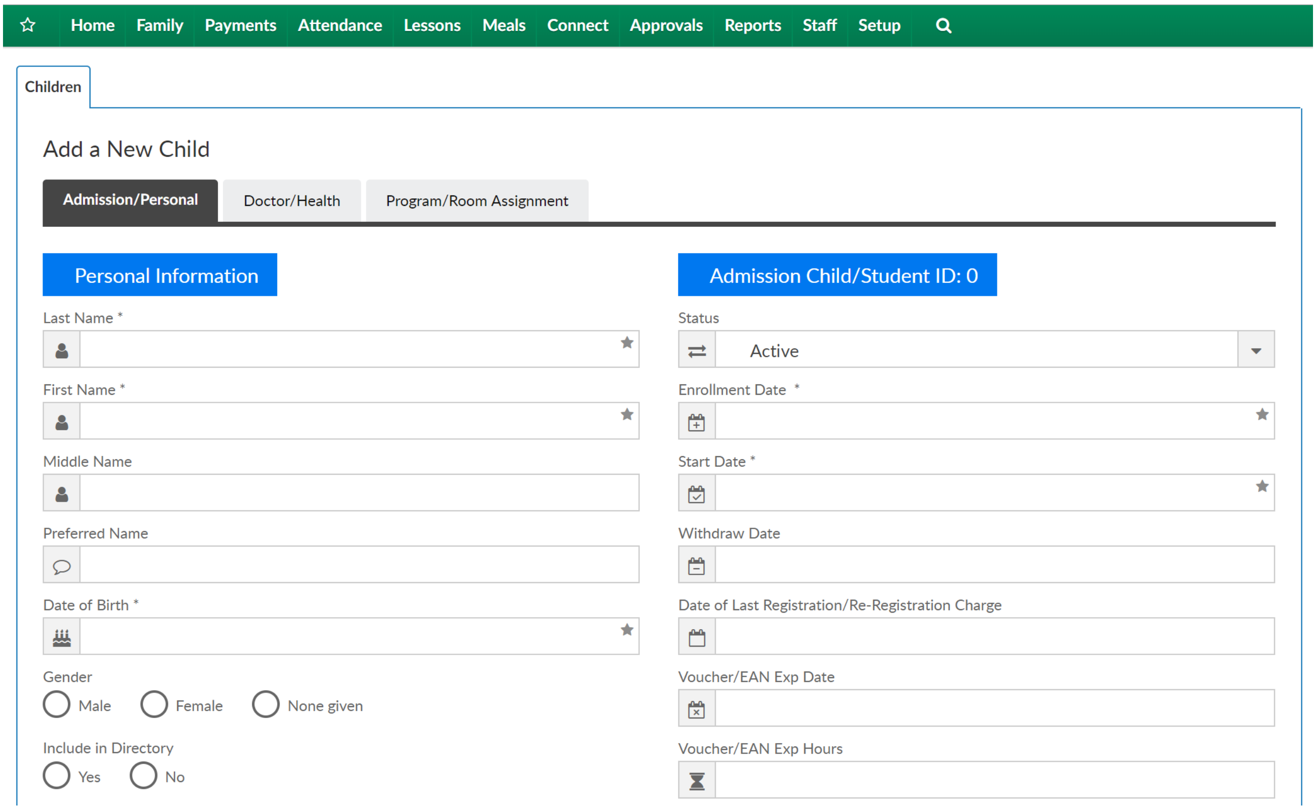
To add a new family to the system from the admin side select the star icon from the home screen, then select the option to Add a new child.



This will open an empty child record. The first step in creating a family record is to add a child. The ONLY detail that is required to add a child is marked with an *. All of the other fields are not mandatory- it will be up to a center what is required when a staff or admin user manually adds a child to the system.

- Last Name
- First Name
- Date of Birth
- Start Date- date the child will begin at the site

- Enroll Date- date the child registered



Add a New Child

Personal Information

Last Name *

First Name *

Middle Name

Preferred Name

Date of Birth *

Gender
○ Male ○ Female ○ None given

Include in Directory
○ Yes ○ No

Admission Child/Student ID: 0

Status: Active

Enrollment Date *

Start Date *

Withdraw Date

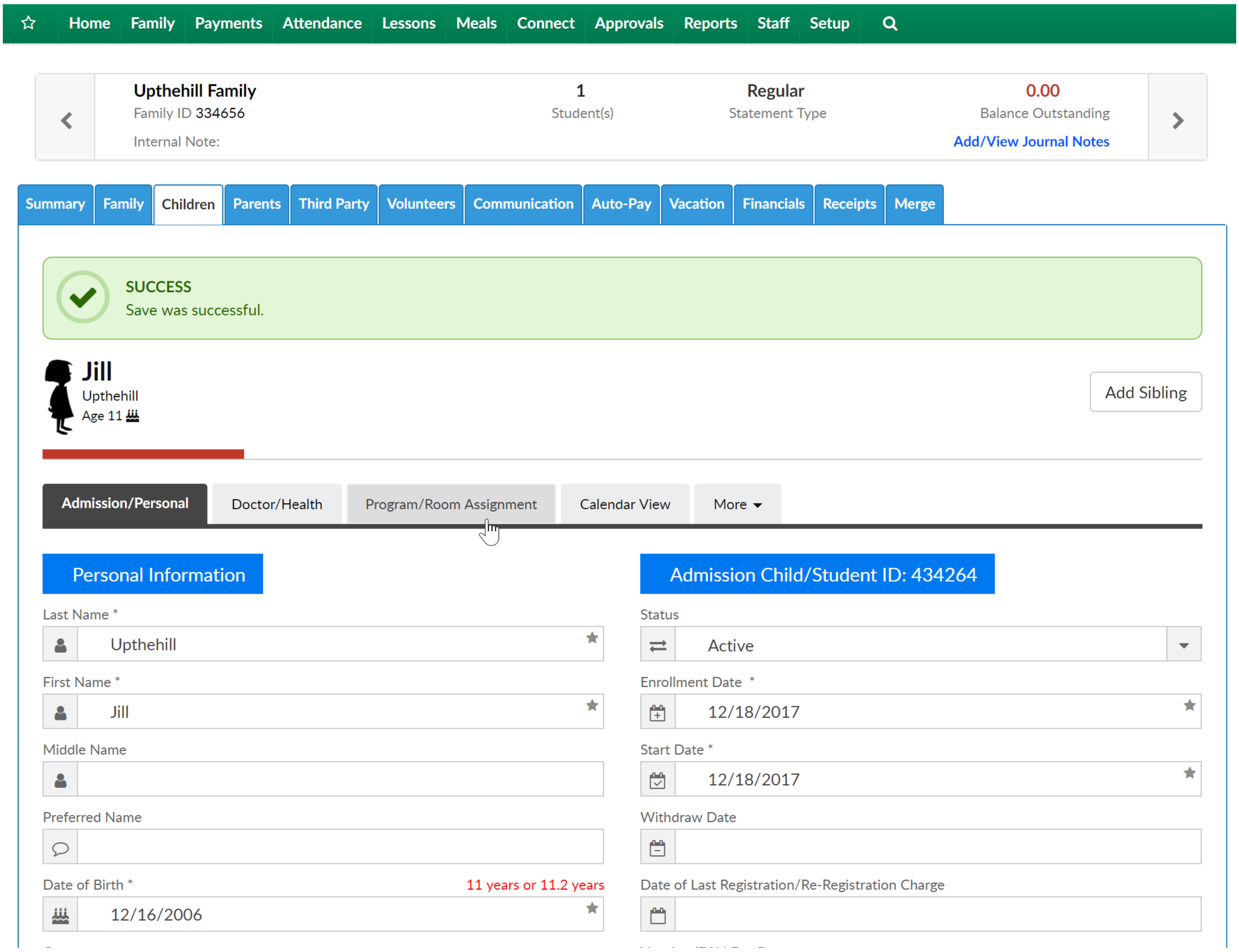
Date of Last Registration/Re-Registration Charge

Voucher/EAN Exp Date

Voucher/EAN Exp Hours

Once this information is entered into the system press **Save**.

After pressing Save, the family record will expand and additional fields will display. The staff or admin user should enter available information to the Doctor/Health tab, add a program/room assignment for the child and add any Parent information on the Parent/Guardian tabs for Parent 1 and Parent 2. Be sure to scroll to the bottom of the page and press Save on each page before moving onto the next screen.



Upthehill Family
Family ID 334656
Internal Note:

1
Student(s)

Regular
Statement Type

0.00
Balance Outstanding
Add/View Journal Notes

SUCCESS
Save was successful.

Jill
Upthehill
Age 11

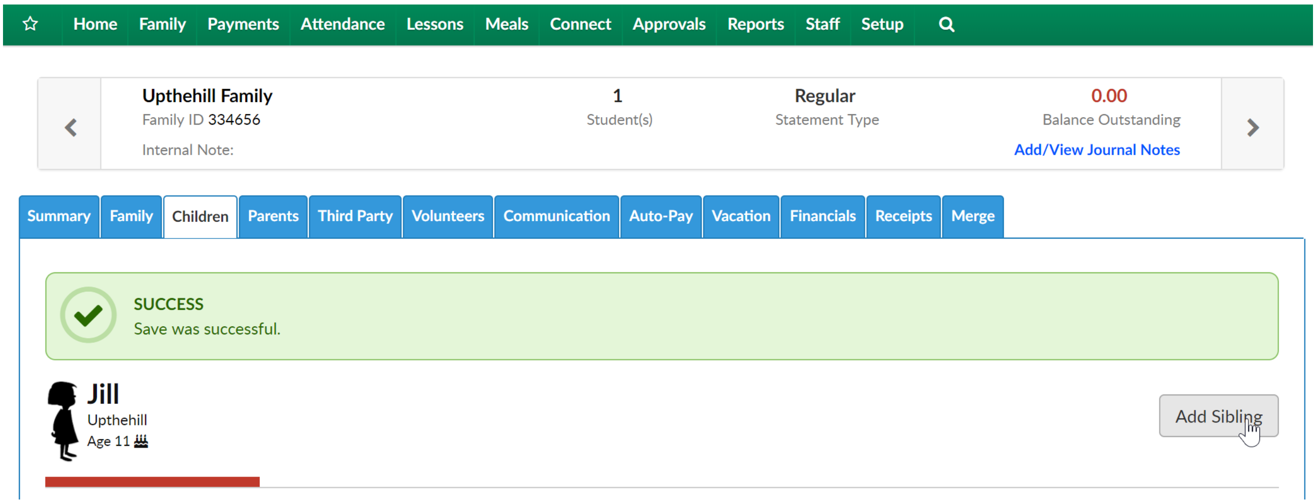
Personal Information

Last Name * Upthehill
First Name * Jill
Middle Name
Preferred Name
Date of Birth * 12/16/2006 — 11 years or 11.2 years

Admission Child/Student ID: 434264

Status: Active
Enrollment Date * 12/18/2017
Start Date * 12/18/2017
Withdraw Date
Date of Last Registration/Re-Registration Charge

To add a child to an existing family select the Add Sibling button.



Upthehill Family
Family ID 334656
Internal Note:

1
Student(s)

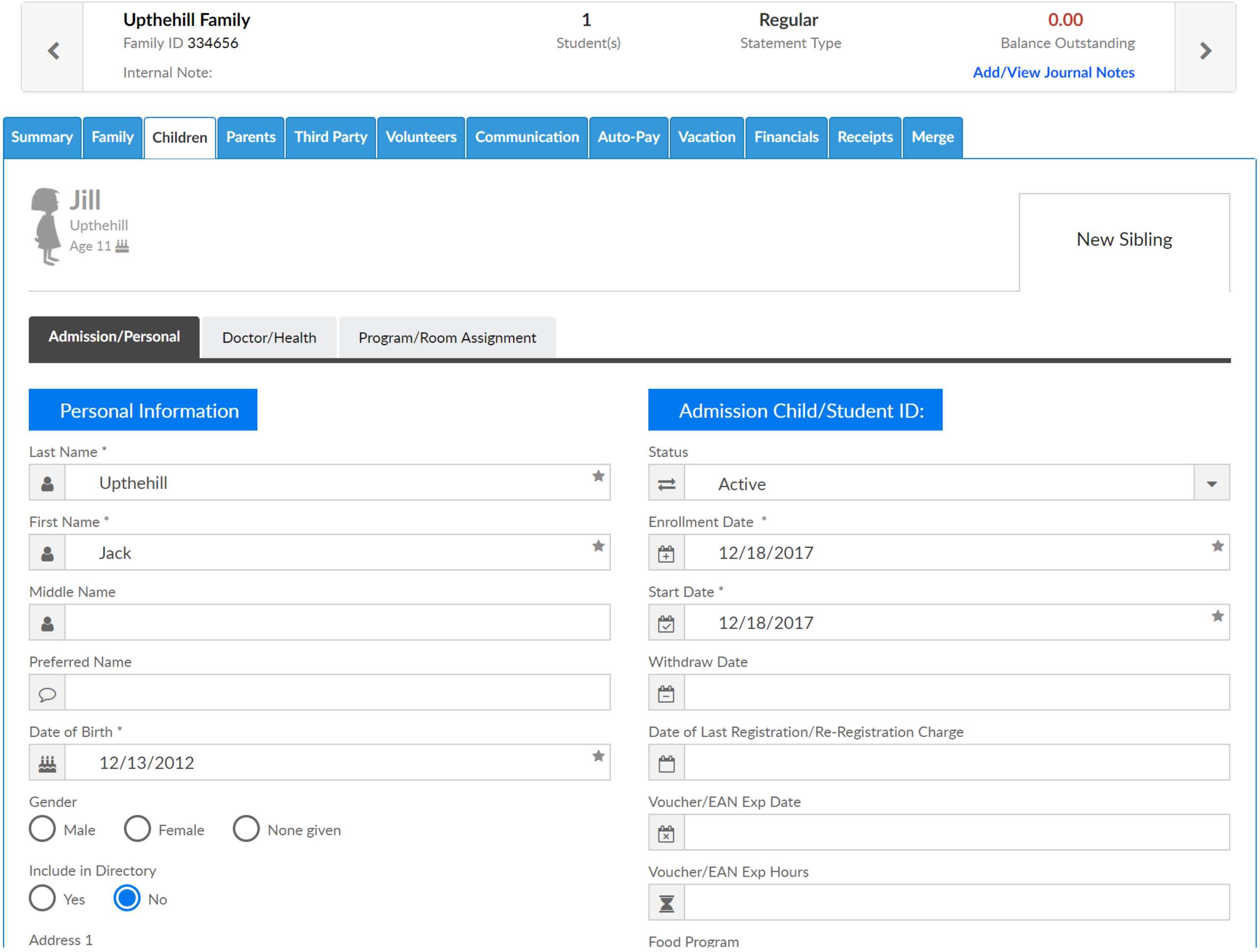
Regular
Statement Type

0.00
Balance Outstanding
Add/View Journal Notes

SUCCESS
Save was successful.

Jill
Upthehill
Age 11

Enter required and optional information as available, then scroll to the bottom of the page and press Save.



Upthehill Family
Family ID 334656
Internal Note:

1 Student(s)
Regular Statement Type
0.00 Balance Outstanding
Add/View Journal Notes

Jill
Upthehill
Age 11

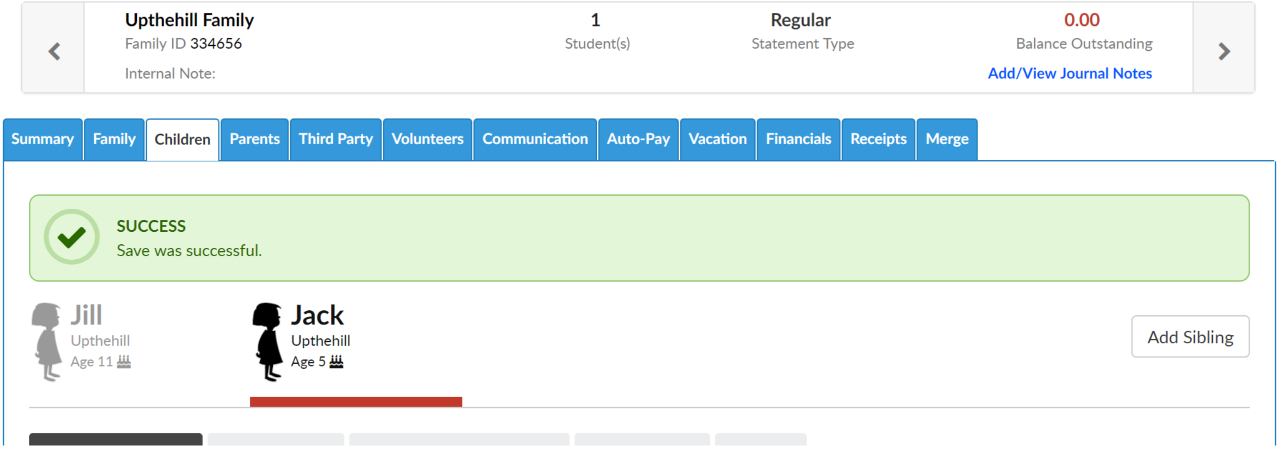
Personal Information

Last Name *: Upthehill
First Name *: Jack
Middle Name:
Preferred Name:
Date of Birth *: 12/13/2012
Gender: ○ Male ○ Female ○ None given
Include in Directory: ○ Yes ● No
Address 1

Admission Child/Student ID:

Status: Active
Enrollment Date *: 12/18/2017
Start Date *: 12/18/2017
Withdraw Date:
Date of Last Registration/Re-Registration Charge:
Voucher/EAN Exp Date:
Voucher/EAN Exp Hours:
Food Program

Once saved a confirmation box will appear and the new child will have an icon display next to the original child.



Upthehill Family
Family ID 334656
Internal Note:

1 Student(s)
Regular Statement Type
0.00 Balance Outstanding
Add/View Journal Notes

SUCCESS
Save was successful.

Jill
Upthehill
Age 11

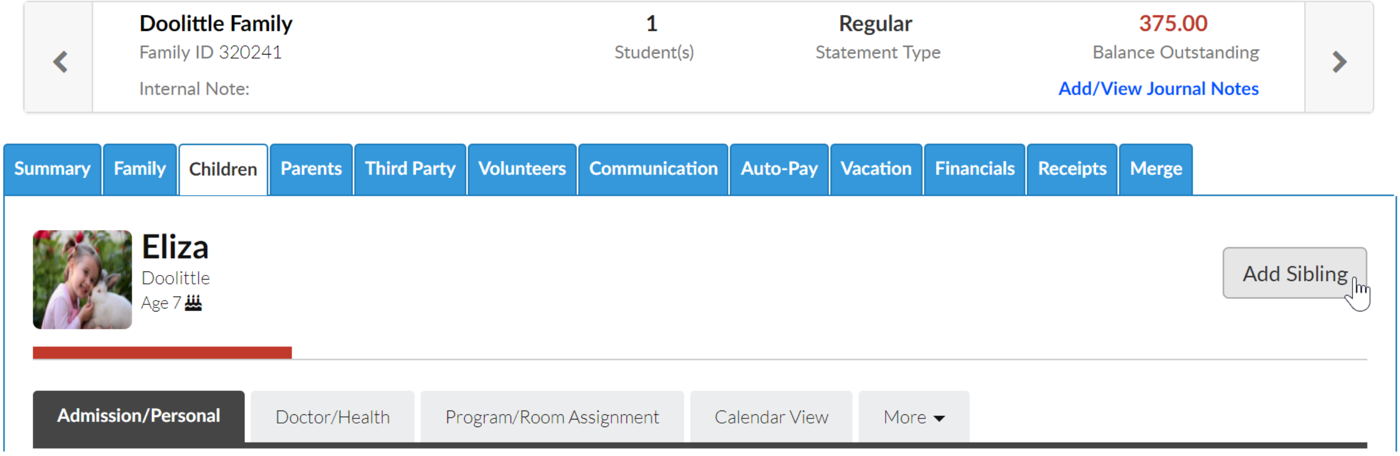
Jack
Upthehill
Age 5

Family- How can an administrator or staff user add a sibling?

Last Modified on 06/27/2018 9:10 am EDT

If a staff or admin user has access to the family record screen and the ability to add a sibling, they will be able to add a child for a parent.

The admin or staff user would go to the family record and then select the Children tab, then select Add Sibling-



Doolittle Family
Family ID 320241
Internal Note:

1 Student(s)

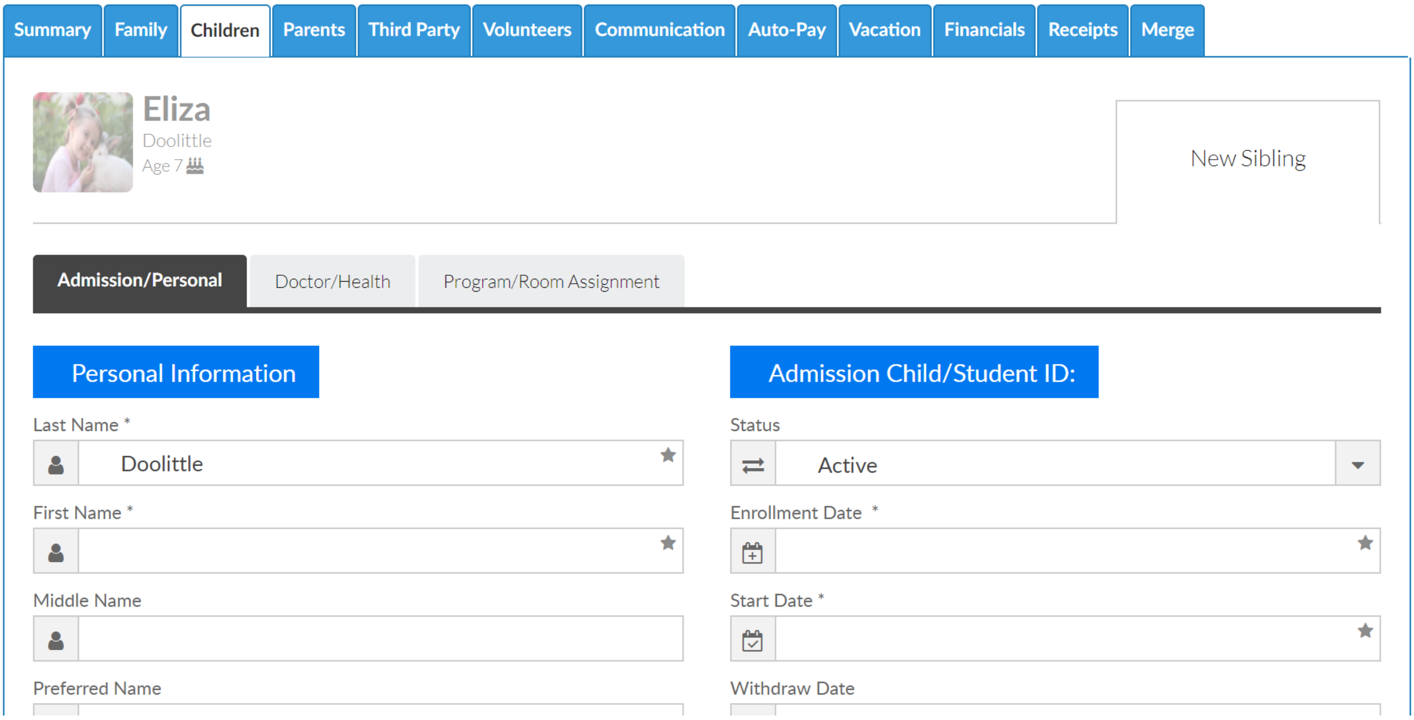
Regular Statement Type

375.00 Balance Outstanding

Add/View Journal Notes

Eliza
Doolittle
Age 7

A blank child record will display, once detail has been entered, press save to complete, any field with a star is a required field.



Eliza
Doolittle
Age 7

New Sibling

Personal Information

Last Name * Doolittle

First Name *

Middle Name

Preferred Name

Admission Child/Student ID:

Status: Active

Enrollment Date *

Start Date *

Withdraw Date

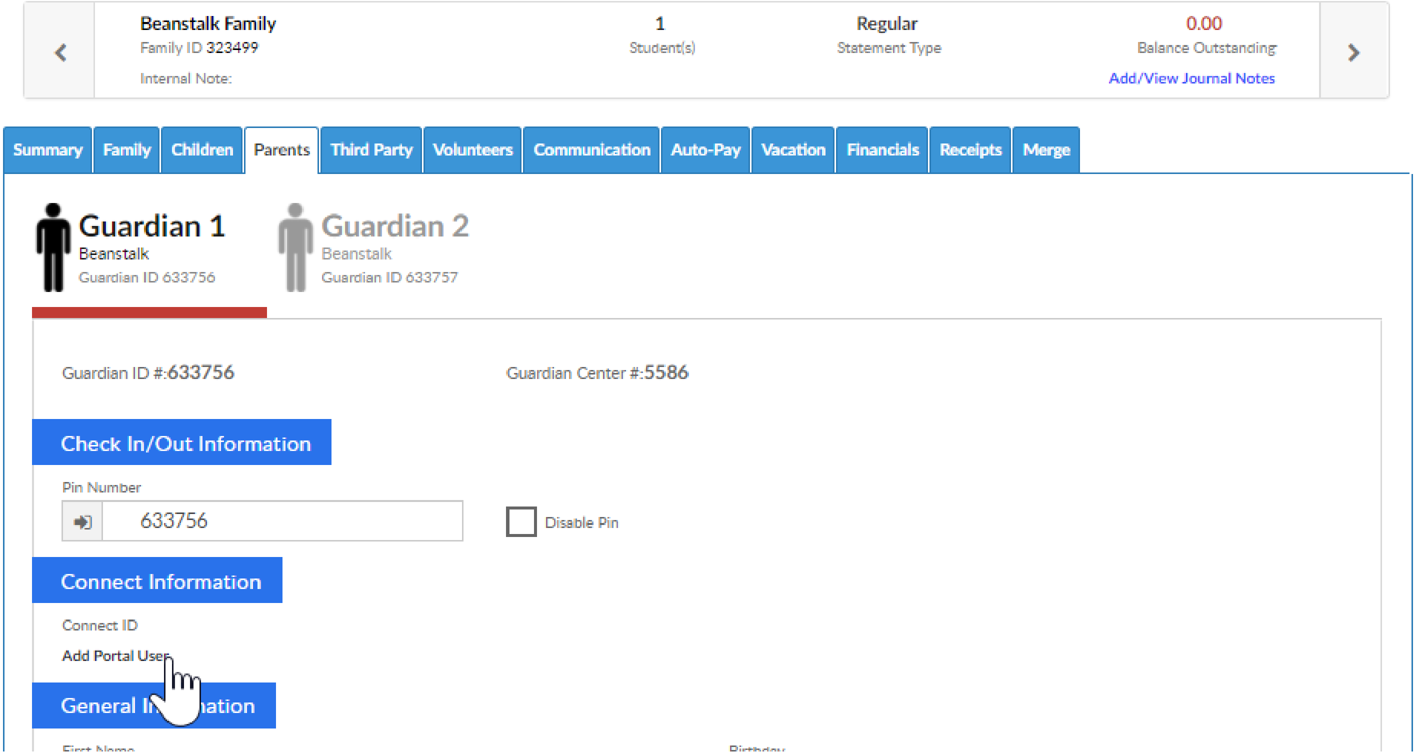
Family- How do I add/update a username/ change password for parent?

Last Modified on 01/09/2018 3:37 pm EST

To add or change a username or password for a parent so they are able to access the parent or Connect portal, go to the family's record within the system- then select the Parent tab.

Be sure the correct parent is highlighted.

To add a user to the portal, select the Add Portal User link-



Guardian ID #:633756

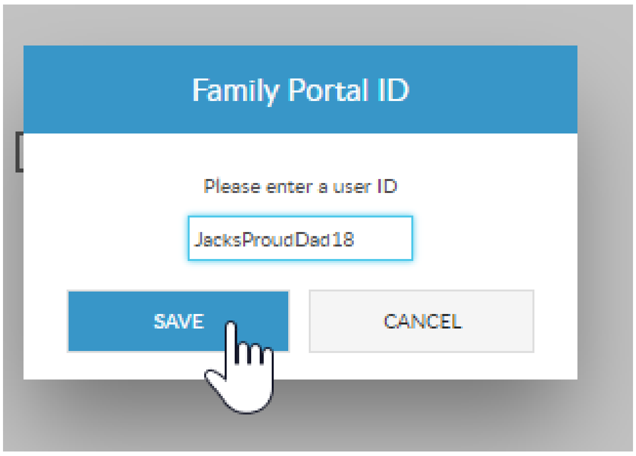
Guardian Center #:5586

Pin Number: 633756

☐ Disable Pin

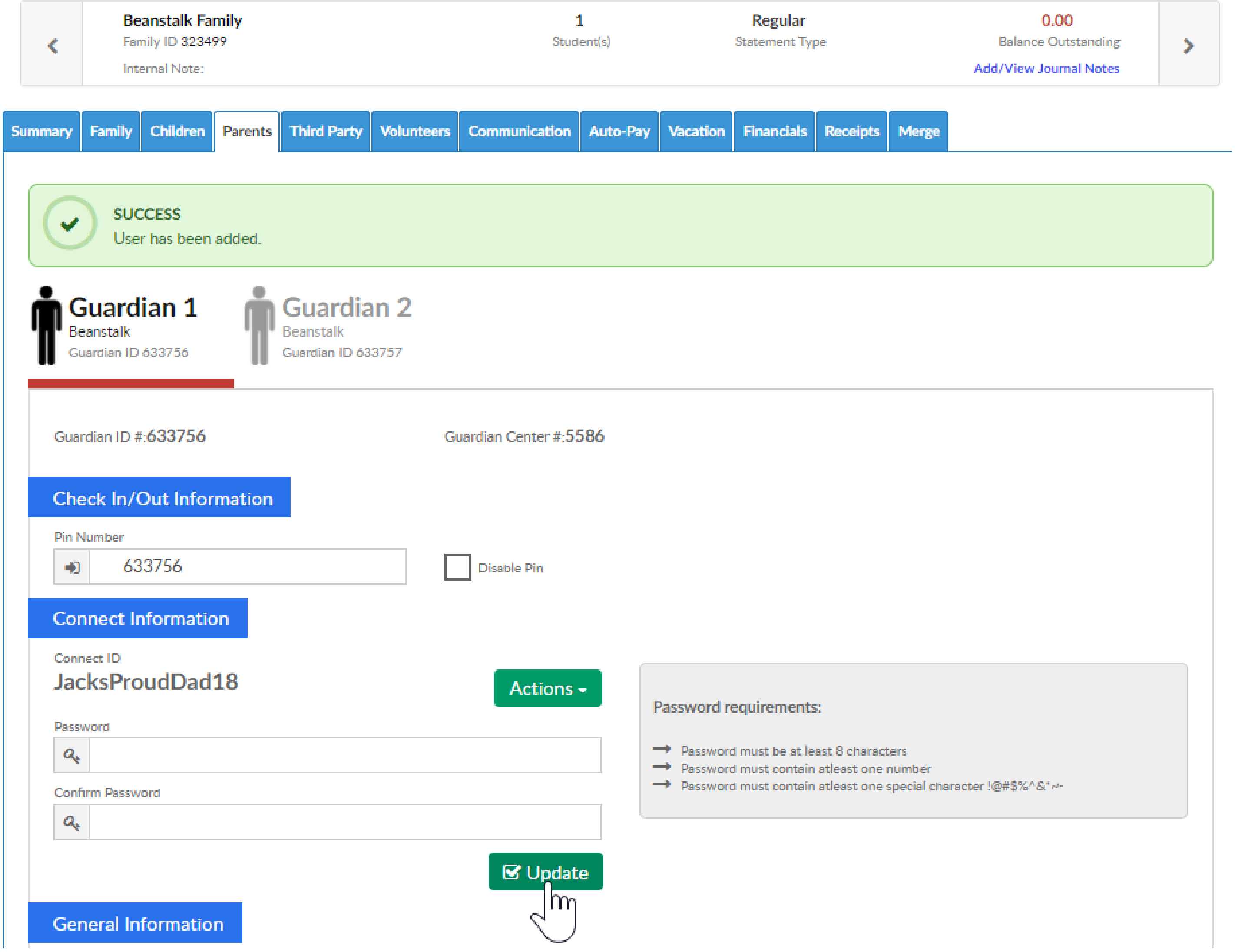
Connect ID

Add the username, then press save. Note: the username must be unique across our servers- you will be notified if the entered name has been taken!



Please enter a user ID
JacksProudDad18

As a default the password will be the same as the username. If the password should be updated enter the same password in the Password and Confirm Password Fields. Password requirements will be displayed to the left of the password boxes in grey.



Beanstalk Family
Family ID 323499
Internal Note:
1 Student(s)
Regular Statement Type
0.00 Balance Outstanding

SUCCESS
User has been added.

Guardian 1
Beanstalk
Guardian ID 633756

Guardian 2
Beanstalk
Guardian ID 633757

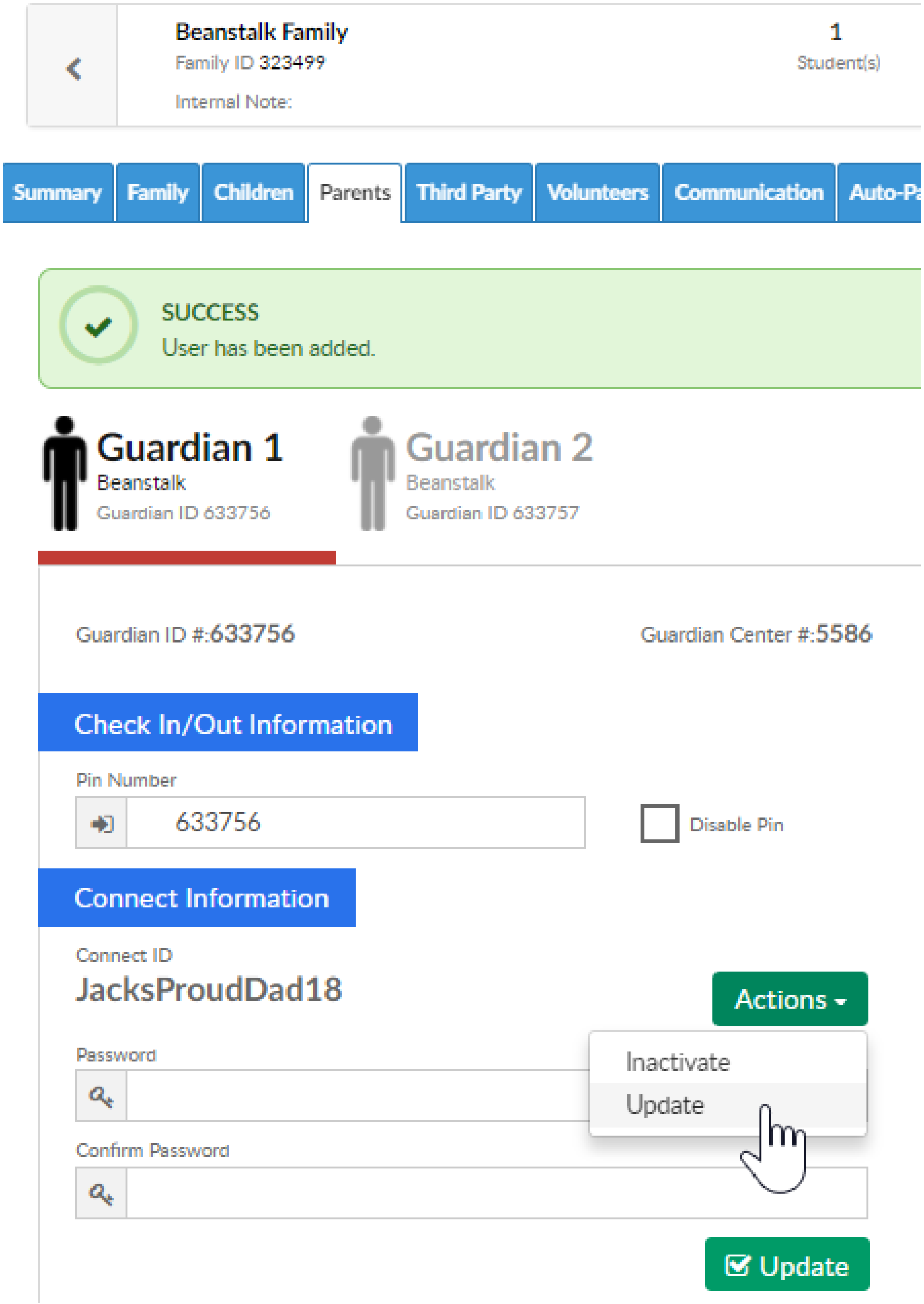
Guardian ID #:633756
Guardian Center #:5586

Pin Number: 633756
☐ Disable Pin

Connect ID: JacksProudDad18
Password:
Confirm Password:

Password requirements:
- Password must be at least 8 characters
- Password must contain atleast one number
- Password must contain atleast one special character !@#$%^&*~-

To update a username, select the Actions menu. Then select the update link



Beanstalk Family
Family ID 323499
Internal Note:
1
Student(s)

SUCCESS
User has been added.

Guardian 1
Beanstalk
Guardian ID 633756

Guardian 2
Beanstalk
Guardian ID 633757

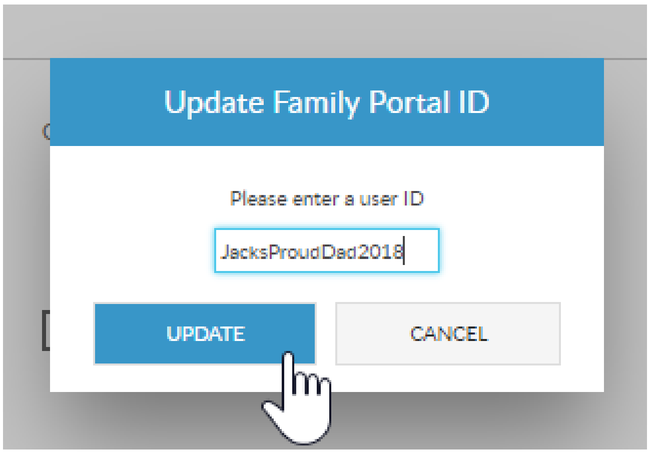
Guardian ID #:633756

Guardian Center #:5586

Pin Number: 633756

Connect ID: JacksProudDad18

Add the new username, then press Update.

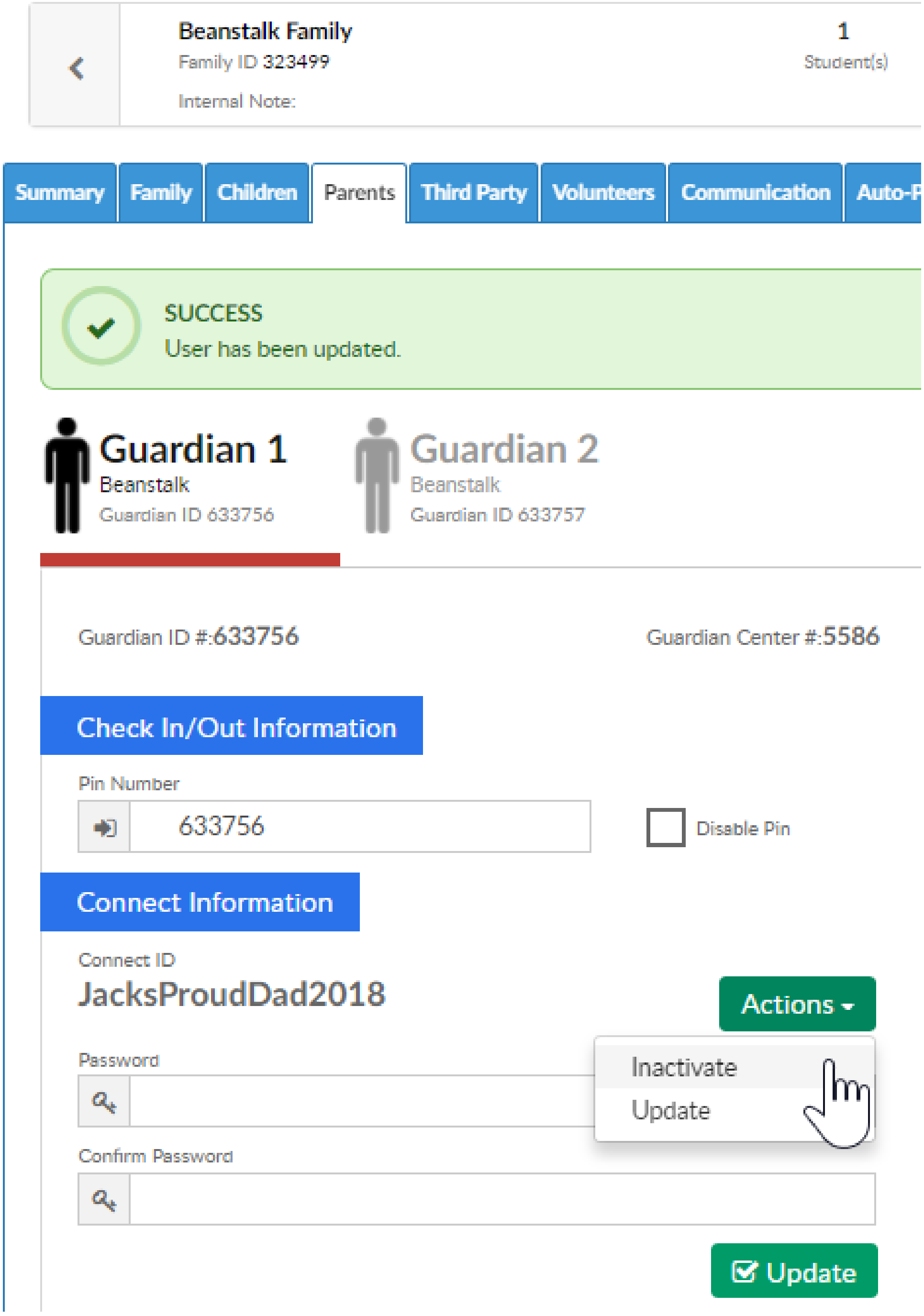


Update Family Portal ID

Please enter a user ID

JacksProudDad2018

If the user should no longer be able to access the portal, select the Actions menu, then press the Inactivate button. The user will no longer be able to login to the portal. At any time access can be changed by selecting the Actions button and press the Activate option.



Beanstalk Family
Family ID 323499
Internal Note:
1 Student(s)

SUCCESS
User has been updated.

Guardian 1
Beanstalk
Guardian ID 633756

Guardian 2
Beanstalk
Guardian ID 633757

Guardian ID #:633756
Guardian Center #:5586

Check In/Out Information

Pin Number: 633756

☐ Disable Pin

Connect Information

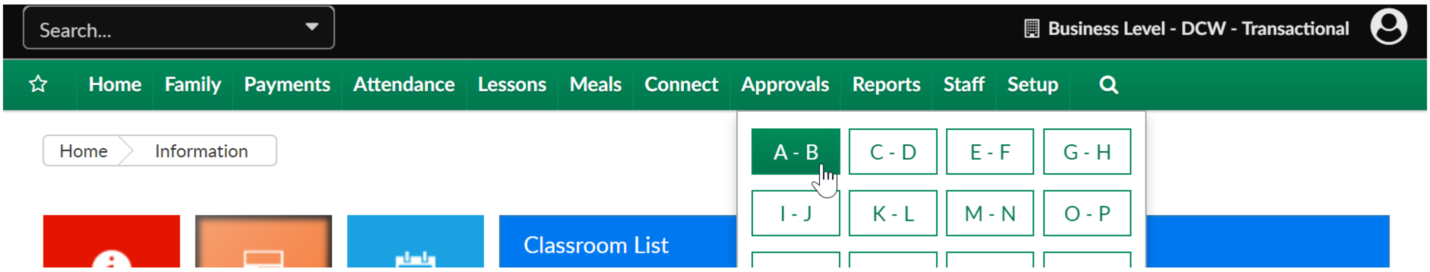
Connect ID: JacksProudDad2018

Child- How do I look at a child's attendance?

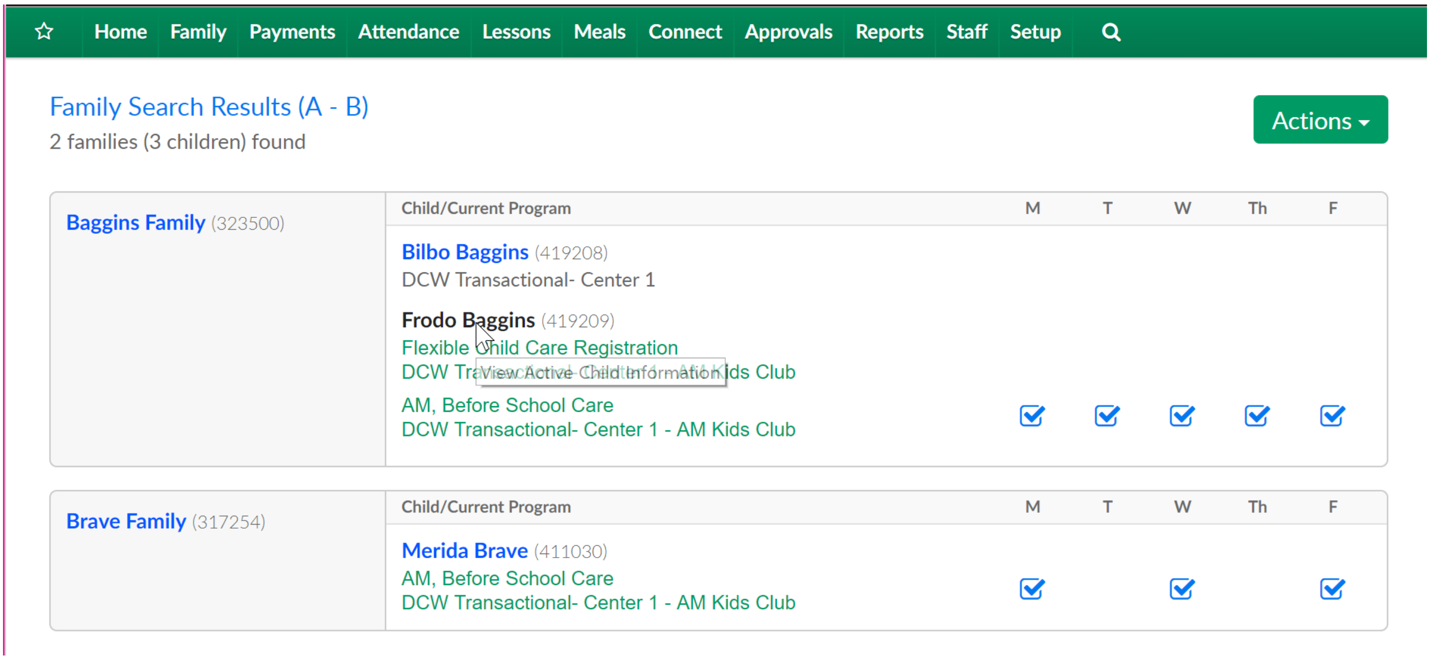
Last Modified on 05/23/2018 8:35 am EDT

To view a child's attendance detail overall for a specific year you can go to the family record, click on the child tab- choose the more menu- then select attendance.

Find the family in the system-



Then select the child's name-

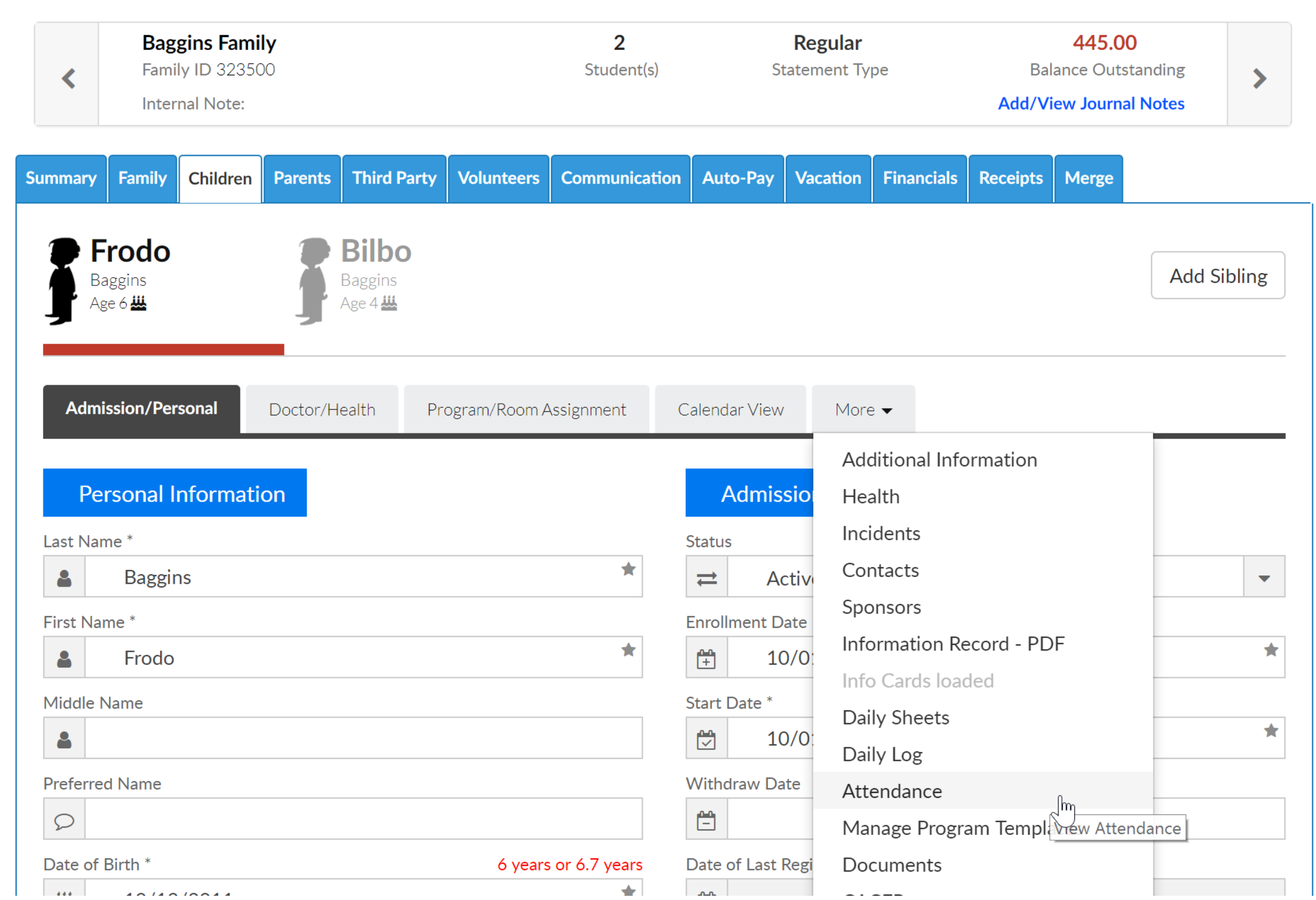


Family Search Results (A - B)

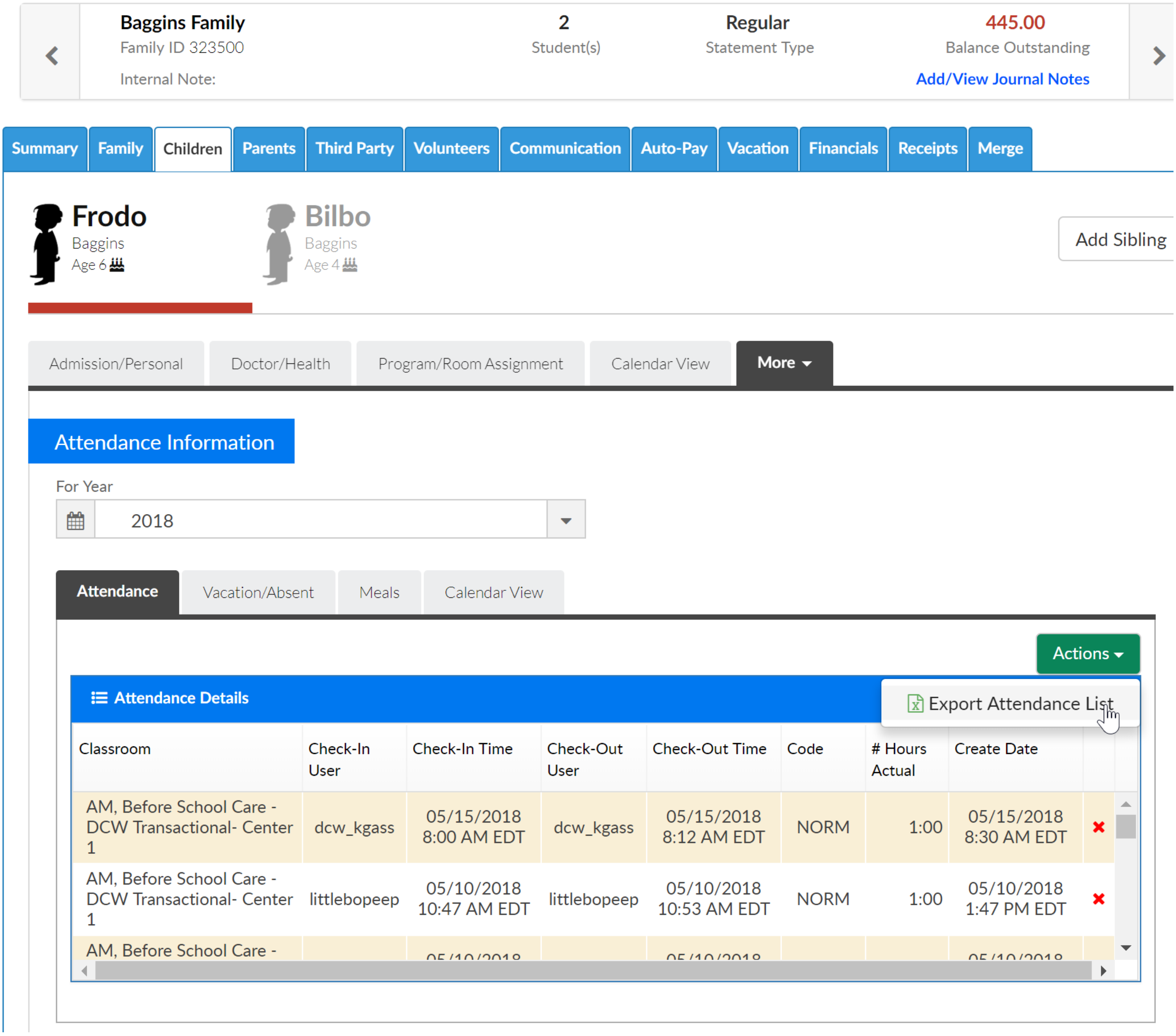
2 families (3 children) found

	Child/Current Program	M	T	W	Th	F
Baggins Family (323500)	Bilbo Baggins (419208) DCW Transactional- Center 1					
	Frodo Baggins (419209) Flexible Child Care Registration DCW Transactional- Center 1 - AM Kids Club					
	AM, Before School Care DCW Transactional- Center 1 - AM Kids Club	☑	☑	☑	☑	☑
Brave Family (317254)	Merida Brave (411030) AM, Before School Care DCW Transactional- Center 1 - AM Kids Club	☑		☑		☑

From the child tab, select the more menu- then select the Attendance option-



Attendance detail will display. This detail cannot be filtered on the screen by date range, only by year. To export to excel, select the actions menu then select Export Attendance List.



Baggins Family
Family ID 323500
Internal Note:

2 Student(s)

Regular Statement Type

445.00 Balance Outstanding

Add/View Journal Notes

Frodo Baggins Age 6

Bilbo Baggins Age 4

Attendance Information

For Year: 2018

Attendance Details

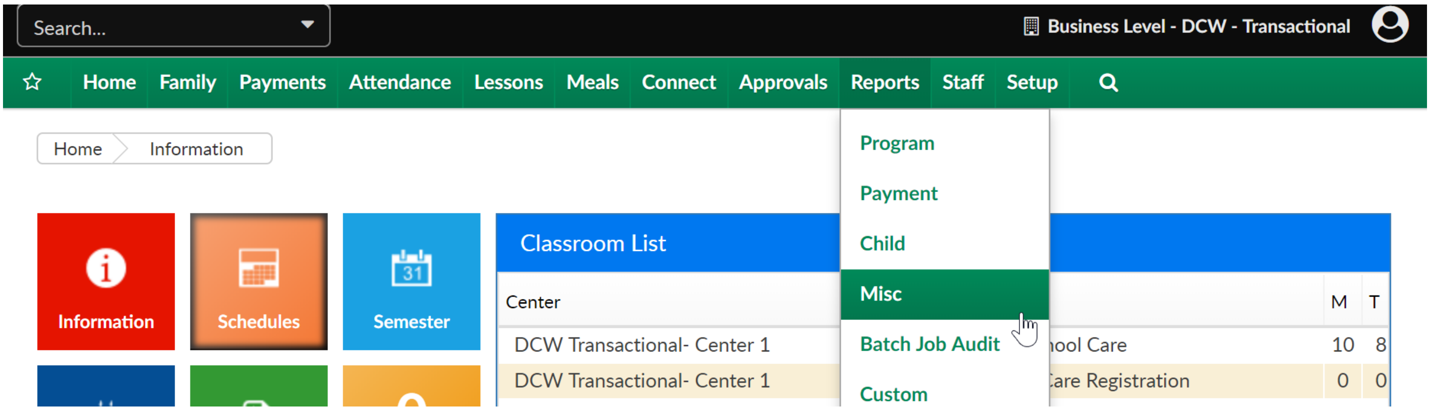
Classroom	Check-In User	Check-In Time	Check-Out User	Check-Out Time	Code	# Hours Actual	Create Date	
AM, Before School Care - DCW Transactional- Center 1	dcw_kgass	05/15/2018 8:00 AM EDT	dcw_kgass	05/15/2018 8:12 AM EDT	NORM	1:00	05/15/2018 8:30 AM EDT	✖
AM, Before School Care - DCW Transactional- Center 1	littlebopeep	05/10/2018 10:47 AM EDT	littlebopeep	05/10/2018 10:53 AM EDT	NORM	1:00	05/10/2018 1:47 PM EDT	✖
AM, Before School Care -								

If you want to pull attendance for a particular period of time, it may be better to go to reports > room/program and pull the child attendance detail report

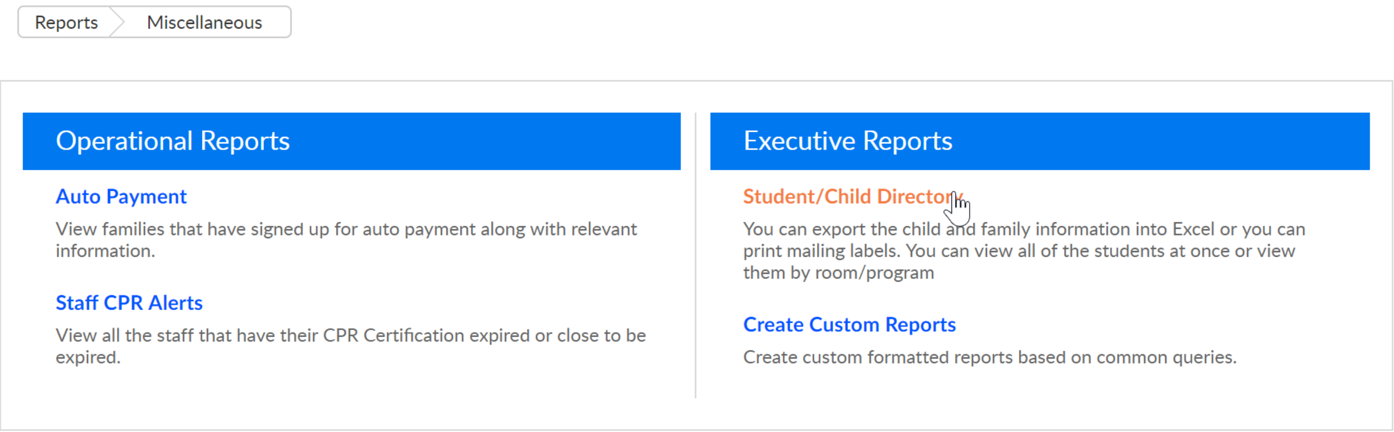
Family- How do I create a directory?

Last Modified on 06/28/2018 2:14 pm EDT

To create a directory go to Reports > Misc



Then select Student/Child Directory-



Operational Reports

Auto Payment

View families that have signed up for auto payment along with relevant information.

Staff CPR Alerts

View all the staff that have their CPR Certification expired or close to be expired.

Executive Reports

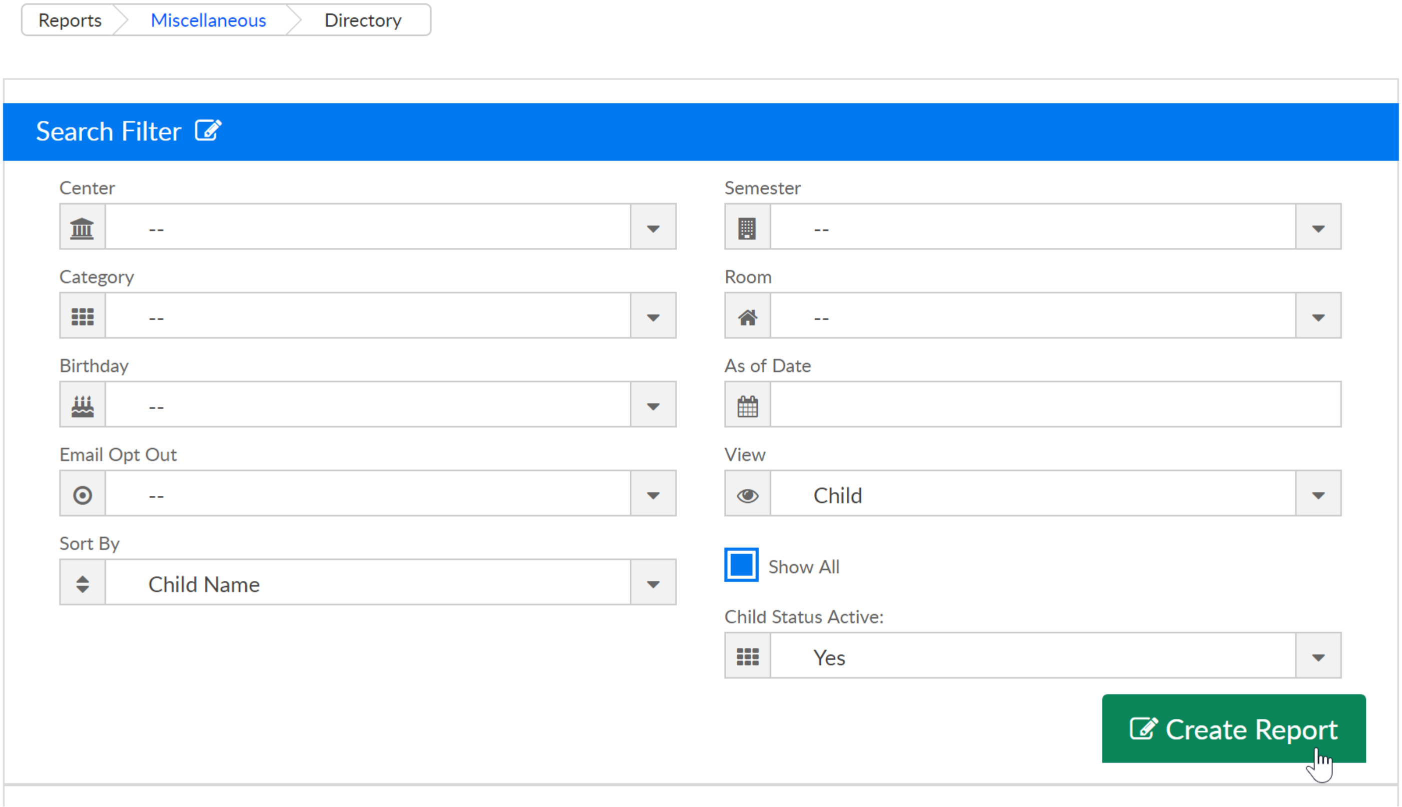
Student/Child Directory

You can export the child and family information into Excel or you can print mailing labels. You can view all of the students at once or view them by room/program

Create Custom Reports

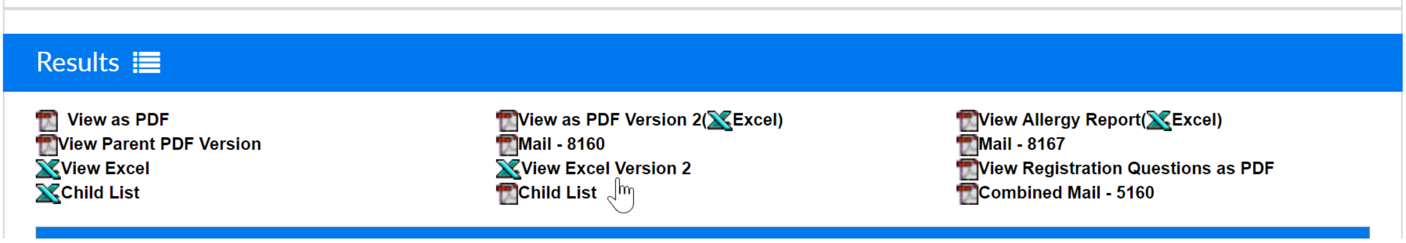
Create custom formatted reports based on common queries.

Enter search criteria, then press Create Report.

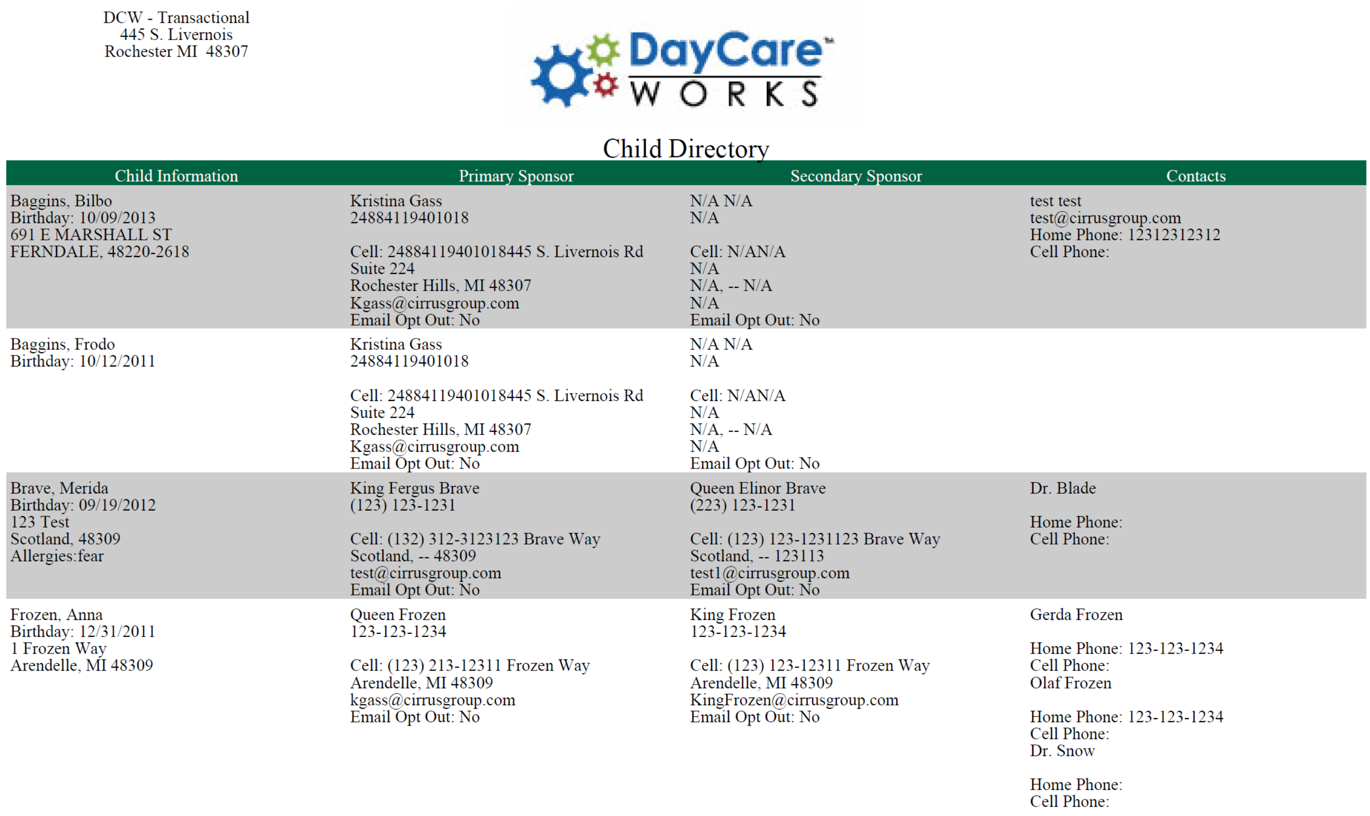


Center: --
Semester: --
Category: --
Room: --
Birthday: --
As of Date:
Email Opt Out: --
View: Child
Sort By: Child Name
☑ Show All
Child Status Active: Yes

There are several report options to choose from, select the option that suits your needs.



View as PDF- this report will display parent and contact information by child according to their home site/center

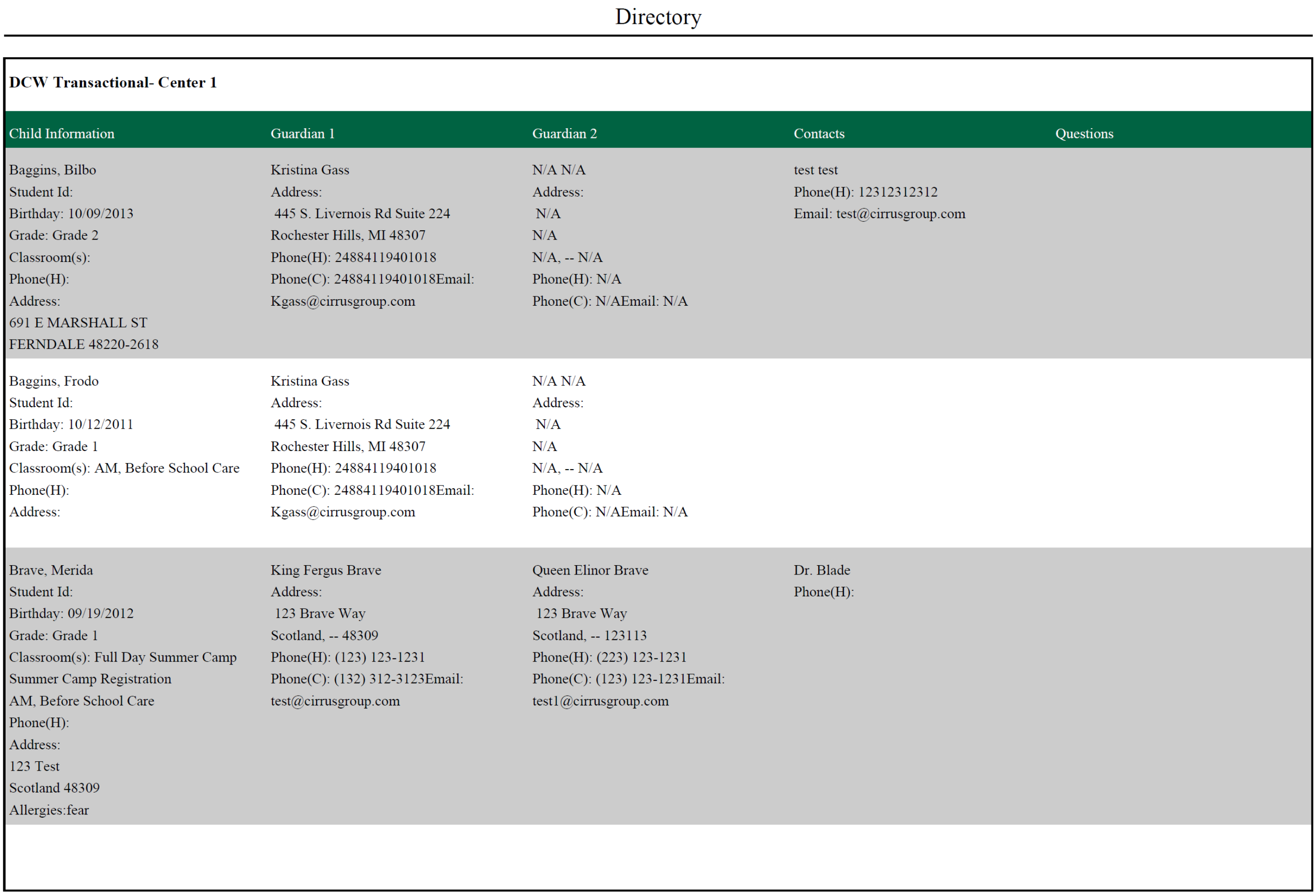


DCW - Transactional
445 S. Livernois
Rochester MI 48307

Child Directory

Child Information	Primary Sponsor	Secondary Sponsor	Contacts
Baggins, Bilbo Birthday: 10/09/2013 691 E MARSHALL ST FERNDALE, 48220-2618	Kristina Gass 24884119401018 Cell: 24884119401018445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com Email Opt Out: No	N/A N/A N/A Cell: N/AN/A N/A N/A, -- N/A N/A Email Opt Out: No	test test test@cirrusgroup.com Home Phone: 12312312312 Cell Phone:
Baggins, Frodo Birthday: 10/12/2011	Kristina Gass 24884119401018 Cell: 24884119401018445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com Email Opt Out: No	N/A N/A N/A Cell: N/AN/A N/A N/A, -- N/A N/A Email Opt Out: No	
Brave, Merida Birthday: 09/19/2012 123 Test Scotland, 48309 Allergies:fear	King Fergus Brave (123) 123-1231 Cell: (132) 312-3123123 Brave Way Scotland, -- 48309 test@cirrusgroup.com Email Opt Out: No	Queen Elinor Brave (223) 123-1231 Cell: (123) 123-1231123 Brave Way Scotland, -- 123113 test1@cirrusgroup.com Email Opt Out: No	Dr. Blade Home Phone: Cell Phone:
Frozen, Anna Birthday: 12/31/2011 1 Frozen Way Arendelle, MI 48309	Queen Frozen 123-123-1234 Cell: (123) 213-12311 Frozen Way Arendelle, MI 48309 kgass@cirrusgroup.com Email Opt Out: No	King Frozen 123-123-1234 Cell: (123) 123-12311 Frozen Way Arendelle, MI 48309 KingFrozen@cirrusgroup.com Email Opt Out: No	Gerda Frozen Home Phone: 123-123-1234 Cell Phone: Olaf Frozen Home Phone: 123-123-1234 Cell Phone: Dr. Snow Home Phone: Cell Phone:

View as PDF Version 2- this report will display parent and contact information by child according to their home site/center. This report also includes extra program registration questions.



Directory

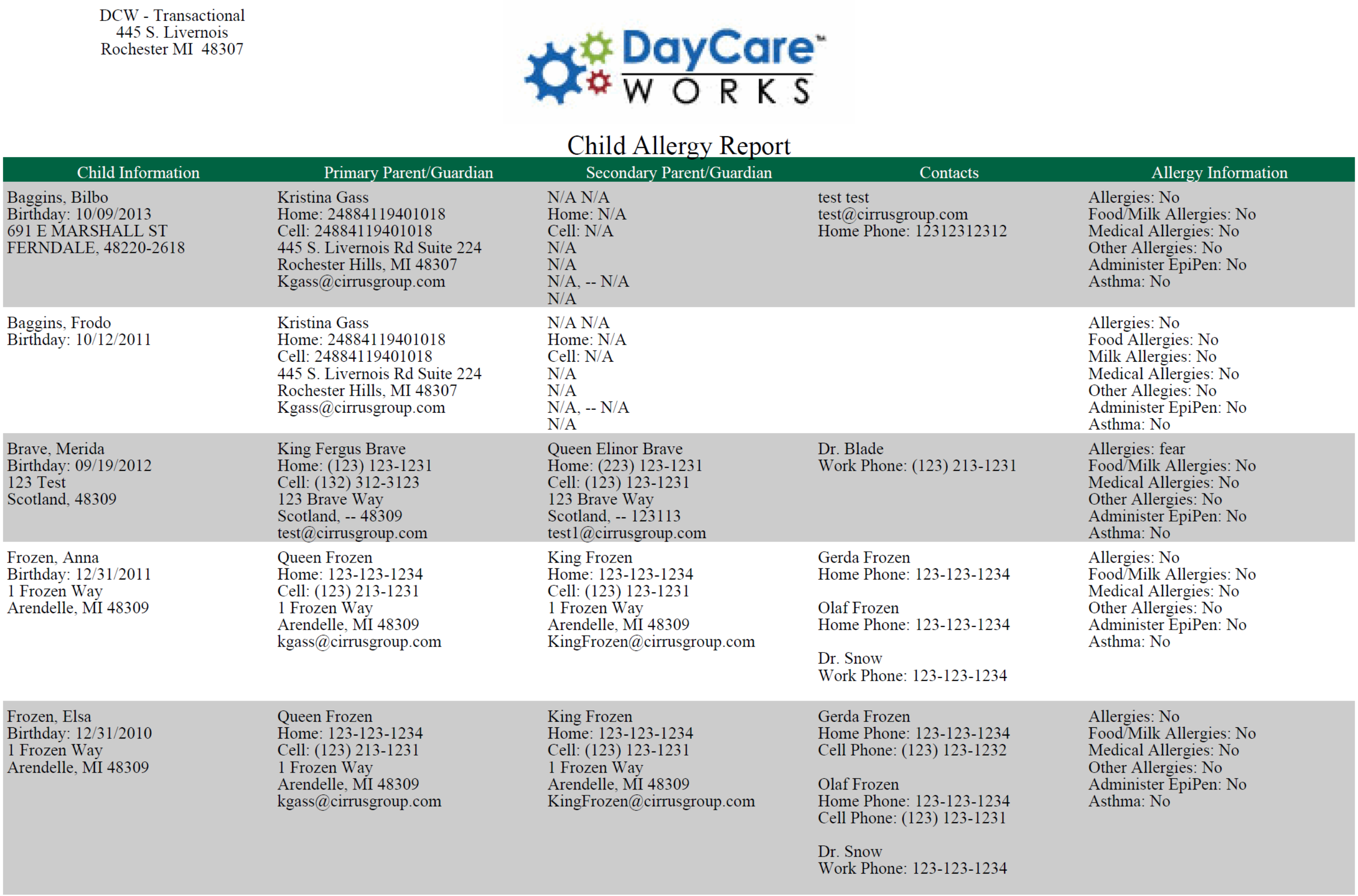
DCW Transactional- Center 1

Child Information	Guardian 1	Guardian 2	Contacts	Questions
Baggins, Bilbo Student Id: Birthday: 10/09/2013 Grade: Grade 2 Classroom(s): Phone(H): Address: 691 E MARSHALL ST FERNDALE 48220-2618	Kristina Gass Address: 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Phone(H): 24884119401018 Phone(C): 24884119401018Email: Kgass@cirrusgroup.com	N/A N/A Address: N/A N/A N/A, -- N/A Phone(H): N/A Phone(C): N/AEmail: N/A	test test Phone(H): 12312312312 Email: test@cirrusgroup.com	
Baggins, Frodo Student Id: Birthday: 10/12/2011 Grade: Grade 1 Classroom(s): AM, Before School Care Phone(H): Address:	Kristina Gass Address: 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Phone(H): 24884119401018 Phone(C): 24884119401018Email: Kgass@cirrusgroup.com	N/A N/A Address: N/A N/A N/A, -- N/A Phone(H): N/A Phone(C): N/AEmail: N/A		
Brave, Merida Student Id: Birthday: 09/19/2012 Grade: Grade 1 Classroom(s): Full Day Summer Camp Summer Camp Registration AM, Before School Care Phone(H): Address: 123 Test Scotland 48309 Allergies:fear	King Fergus Brave Address: 123 Brave Way Scotland, -- 48309 Phone(H): (123) 123-1231 Phone(C): (132) 312-3123Email: test@cirrusgroup.com	Queen Elinor Brave Address: 123 Brave Way Scotland, -- 123113 Phone(H): (223) 123-1231 Phone(C): (123) 123-1231Email: test1@cirrusgroup.com	Dr. Blade Phone(H):	

View as PDF Version 2 (Excel)- this report displays child, parent and contact information.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Center	Child Name	Student ID	Birthday	Grade	Classroom	Phone	Address	City	State	ZIP	In District	Allergies	Infections	Condition	Convulsions	Parent/Guardian 1	Address
DCW Transactional- Center 1	Baggins, Bilbo		10/09/2013	Grade 2			691 E MARSHALL ST	FERNDALE	--	48220-2618	Yes					Kristina Gass	445 S. Livernois Rd Suite 224
DCW Transactional- Center 1	Baggins, Frodo		10/12/2011	Grade 1	AM, Before School Care				--		No					Kristina Gass	445 S. Livernois Rd Suite 224
DCW Transactional- Center 1	Brave, Merida		09/19/2012	Grade 1	Full Day Summer CampSummer Camp Registratic		123 Test	Scotland	--	48309	Yes	fear				King Fergus Brave	123 Brave Way
DCW Transactional- Center 1	Frozen, Anna		12/31/2011	Preschool	Flexible Care, PMFlexible Child Care Registration		1 Frozen Way	Arendelle	MI	48309	Yes					Queen Frozen	1 Frozen Way
DCW Transactional- Center 1	Frozen, Elsa		12/31/2010	Kindergarten	Flexible Child Care Registration		1 Frozen Way	Arendelle	MI	48309	No					Queen Frozen	1 Frozen Way
DCW Transactional- Center 1	Giant, Jolly Green		10/01/2008	Grade 1					--		No					Guardian 1 Giant	
DCW Transactional- Center 1	Oz, Dorthy		09/27/2011	Grade 3	AM, Before School Care				--		No	Milk and honey				Aunty Em Oz	
DCW Transactional- Center 1	Peter Pan, Tinkerbell		08/10/2011				123 Fairy Lane	Neverland	AZ	85641	No	dust				Wendy Peter Pan	123 Fairy Lane
DCW Transactional- Center 1	Test, Test		03/01/2016	PRE			test	test	--	123123	Yes					Guardian 1 Test	test
DCW Transactional- Center 1	Upthehill, Jack		12/13/2012						--		No					Guardian 1 Upthehill	
DCW Transactional- Center 1	Upthehill, Jill		12/16/2006						--		No					Guardian 1 Upthehill	
DCW Transactional- Center 1	Wonderland, Alice		06/06/2012	Kindergarten	PM, After School CareAM, Before School Care		123 Heartway	Wonderland	MI	48309	No					Jane Wonderland	123 Heartway

View Allergy Report- this report displays child, parent and contact information, including health/allergy questions.



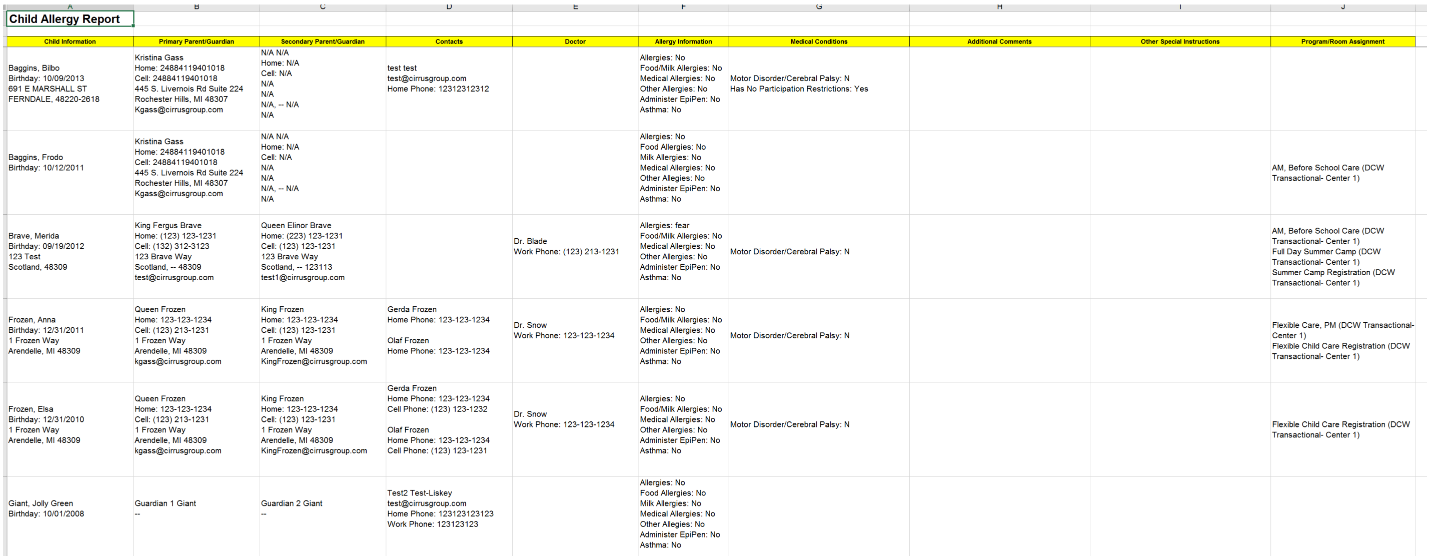
DCW - Transactional
445 S. Livernois
Rochester MI 48307

DayCare WORKS™

Child Allergy Report

Child Information	Primary Parent/Guardian	Secondary Parent/Guardian	Contacts	Allergy Information
Baggins, Bilbo Birthday: 10/09/2013 691 E MARSHALL ST FERNDALE, 48220-2618	Kristina Gass Home: 24884119401018 Cell: 24884119401018 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com	N/A N/A Home: N/A Cell: N/A N/A N/A N/A, -- N/A N/A	test test test@cirrusgroup.com Home Phone: 12312312312	Allergies: No Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No
Baggins, Frodo Birthday: 10/12/2011	Kristina Gass Home: 24884119401018 Cell: 24884119401018 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com	N/A N/A Home: N/A Cell: N/A N/A N/A N/A, -- N/A N/A		Allergies: No Food Allergies: No Milk Allergies: No Medical Allergies: No Other Allegies: No Administer EpiPen: No Asthma: No
Brave, Merida Birthday: 09/19/2012 123 Test Scotland, 48309	King Fergus Brave Home: (123) 123-1231 Cell: (132) 312-3123 123 Brave Way Scotland, -- 48309 test@cirrusgroup.com	Queen Elinor Brave Home: (223) 123-1231 Cell: (123) 123-1231 123 Brave Way Scotland, -- 123113 test1@cirrusgroup.com	Dr. Blade Work Phone: (123) 213-1231	Allergies: fear Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No
Frozen, Anna Birthday: 12/31/2011 1 Frozen Way Arendelle, MI 48309	Queen Frozen Home: 123-123-1234 Cell: (123) 213-1231 1 Frozen Way Arendelle, MI 48309 kgass@cirrusgroup.com	King Frozen Home: 123-123-1234 Cell: (123) 123-1231 1 Frozen Way Arendelle, MI 48309 KingFrozen@cirrusgroup.com	Gerda Frozen Home Phone: 123-123-1234 Olaf Frozen Home Phone: 123-123-1234 Dr. Snow Work Phone: 123-123-1234	Allergies: No Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No
Frozen, Elsa Birthday: 12/31/2010 1 Frozen Way Arendelle, MI 48309	Queen Frozen Home: 123-123-1234 Cell: (123) 213-1231 1 Frozen Way Arendelle, MI 48309 kgass@cirrusgroup.com	King Frozen Home: 123-123-1234 Cell: (123) 123-1231 1 Frozen Way Arendelle, MI 48309 KingFrozen@cirrusgroup.com	Gerda Frozen Home Phone: 123-123-1234 Cell Phone: (123) 123-1232 Olaf Frozen Home Phone: 123-123-1234 Cell Phone: (123) 123-1231 Dr. Snow Work Phone: 123-123-1234	Allergies: No Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No

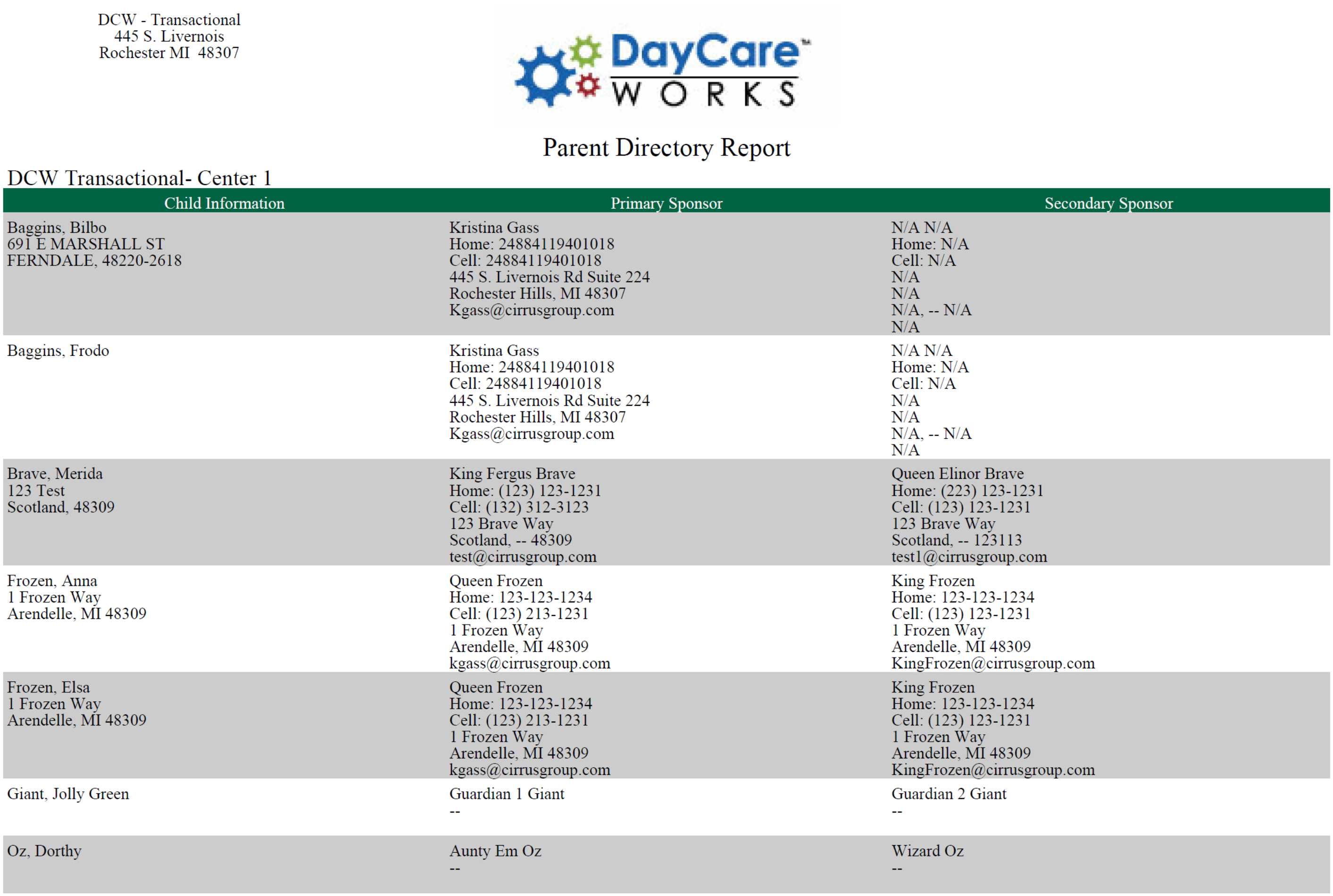
View Allergy Report (Excel)- this report displays child, parent and contact information, including health/allergy questions.



Child Allergy Report

Child Information	Primary Parent/Guardian	Secondary Parent/Guardian	Contacts	Doctor	Allergy Information	Medical Conditions	Additional Comments	Other Special Instructions	Program/Room Assignment
Baggins, Bilbo Birthday: 10/09/2013 691 E MARSHALL ST FERNDALE, 48220-2618	Kristina Gass Home: 24884119401018 Cell: 24884119401018 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com	N/A N/A Home: N/A Cell: N/A N/A N/A N/A, -- N/A N/A	test test test@cirrusgroup.com Home Phone: 12312312312		Allergies: No Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No	Motor Disorder/Cerebral Palsy: N Has No Participation Restrictions: Yes			
Baggins, Frodo Birthday: 10/12/2011	Kristina Gass Home: 24884119401018 Cell: 24884119401018 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com	N/A N/A Home: N/A Cell: N/A N/A N/A N/A, -- N/A N/A			Allergies: No Food Allergies: No Milk Allergies: No Medical Allergies: No Other Allegies: No Administer EpiPen: No Asthma: No				AM, Before School Care (DCW Transactional- Center 1)
Brave, Merida Birthday: 09/19/2012 123 Test Scotland, 48309	King Fergus Brave Home: (123) 123-1231 Cell: (132) 312-3123 123 Brave Way Scotland, -- 48309 test@cirrusgroup.com	Queen Elinor Brave Home: (223) 123-1231 Cell: (123) 123-1231 123 Brave Way Scotland, -- 123113 test1@cirrusgroup.com		Dr. Blade Work Phone: (123) 213-1231	Allergies: fear Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No	Motor Disorder/Cerebral Palsy: N			AM, Before School Care (DCW Transactional- Center 1) Full Day Summer Camp (DCW Transactional- Center 1) Summer Camp Registration (DCW Transactional- Center 1)
Frozen, Anna Birthday: 12/31/2011 1 Frozen Way Arendelle, MI 48309	Queen Frozen Home: 123-123-1234 Cell: (123) 213-1231 1 Frozen Way Arendelle, MI 48309 kgass@cirrusgroup.com	King Frozen Home: 123-123-1234 Cell: (123) 123-1231 1 Frozen Way Arendelle, MI 48309 KingFrozen@cirrusgroup.com	Gerda Frozen Home Phone: 123-123-1234 Olaf Frozen Home Phone: 123-123-1234	Dr. Snow Work Phone: 123-123-1234	Allergies: No Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No	Motor Disorder/Cerebral Palsy: N			Flexible Care, PM (DCW Transactional- Center 1) Flexible Child Care Registration (DCW Transactional- Center 1)
Frozen, Elsa Birthday: 12/31/2010 1 Frozen Way Arendelle, MI 48309	Queen Frozen Home: 123-123-1234 Cell: (123) 213-1231 1 Frozen Way Arendelle, MI 48309 kgass@cirrusgroup.com	King Frozen Home: 123-123-1234 Cell: (123) 123-1231 1 Frozen Way Arendelle, MI 48309 KingFrozen@cirrusgroup.com	Gerda Frozen Home Phone: 123-123-1234 Cell Phone: (123) 123-1232 Olaf Frozen Home Phone: 123-123-1234 Cell Phone: (123) 123-1231	Dr. Snow Work Phone: 123-123-1234	Allergies: No Food/Milk Allergies: No Medical Allergies: No Other Allergies: No Administer EpiPen: No Asthma: No	Motor Disorder/Cerebral Palsy: N			Flexible Child Care Registration (DCW Transactional- Center 1)
Giant, Jolly Green Birthday: 10/01/2008	Guardian 1 Giant --	Guardian 2 Giant --	Test2 Test-Liskey test@cirrusgroup.com Home Phone: 123123123123 Work Phone: 123123123		Allergies: No Food Allergies: No Milk Allergies: No Medical Allergies: No Other Allegies: No Administer EpiPen: No Asthma: No				

View Parent PDF Version- this report displays child and parent information only.



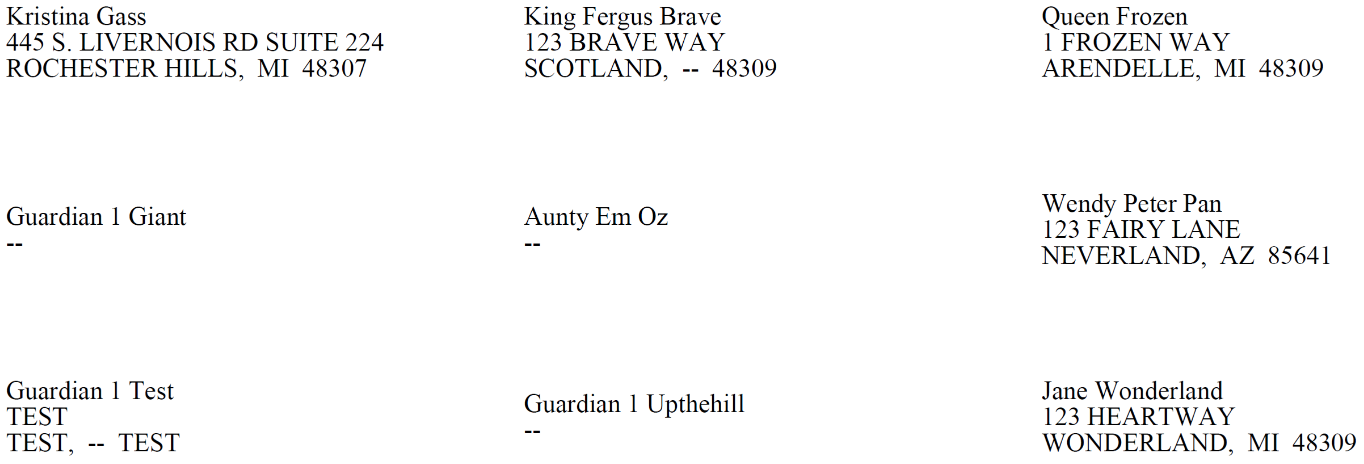
DCW - Transactional
445 S. Livernois
Rochester MI 48307

Parent Directory Report

DCW Transactional- Center 1

Child Information	Primary Sponsor	Secondary Sponsor
Baggins, Bilbo 691 E MARSHALL ST FERNDALE, 48220-2618	Kristina Gass Home: 24884119401018 Cell: 24884119401018 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com	N/A N/A Home: N/A Cell: N/A N/A N/A N/A, -- N/A N/A
Baggins, Frodo	Kristina Gass Home: 24884119401018 Cell: 24884119401018 445 S. Livernois Rd Suite 224 Rochester Hills, MI 48307 Kgass@cirrusgroup.com	N/A N/A Home: N/A Cell: N/A N/A N/A N/A, -- N/A N/A
Brave, Merida 123 Test Scotland, 48309	King Fergus Brave Home: (123) 123-1231 Cell: (132) 312-3123 123 Brave Way Scotland, -- 48309 test@cirrusgroup.com	Queen Elinor Brave Home: (223) 123-1231 Cell: (123) 123-1231 123 Brave Way Scotland, -- 123113 test1@cirrusgroup.com
Frozen, Anna 1 Frozen Way Arendelle, MI 48309	Queen Frozen Home: 123-123-1234 Cell: (123) 213-1231 1 Frozen Way Arendelle, MI 48309 kgass@cirrusgroup.com	King Frozen Home: 123-123-1234 Cell: (123) 123-1231 1 Frozen Way Arendelle, MI 48309 KingFrozen@cirrusgroup.com
Frozen, Elsa 1 Frozen Way Arendelle, MI 48309	Queen Frozen Home: 123-123-1234 Cell: (123) 213-1231 1 Frozen Way Arendelle, MI 48309 kgass@cirrusgroup.com	King Frozen Home: 123-123-1234 Cell: (123) 123-1231 1 Frozen Way Arendelle, MI 48309 KingFrozen@cirrusgroup.com
Giant, Jolly Green	Guardian 1 Giant --	Guardian 2 Giant --
Oz, Dorthy	Aunty Em Oz --	Wizard Oz --

Mail- 8160- mailing labels, each parent will display separately. For use with these labels- https://www.avery.com/products/labels/8160



Kristina Gass
445 S. LIVERNOIS RD SUITE 224
ROCHESTER HILLS, MI 48307

King Fergus Brave
123 BRAVE WAY
SCOTLAND, -- 48309

Queen Frozen
1 FROZEN WAY
ARENDELLE, MI 48309

Guardian 1 Giant
--

Aunty Em Oz
--

Wendy Peter Pan
123 FAIRY LANE
NEVERLAND, AZ 85641

Guardian 1 Test
TEST
TEST, -- TEST

Guardian 1 Upthehill
--

Jane Wonderland
123 HEARTWAY
WONDERLAND, MI 48309

Mail- 8167- mailing labels, each parent will display separately. For use with these labels- https://www.avery.com/products/labels/8167

Kristina Gass
445 S. LIVERNOIS RD SUITE 224
ROCHESTER HILLS, MI 48307

King Fergus Brave
123 BRAVE WAY
SCOTLAND, -- 48309

Queen Frozen
1 FROZEN WAY
ARENDELLE, MI 48309

Guardian 1 Giant
--

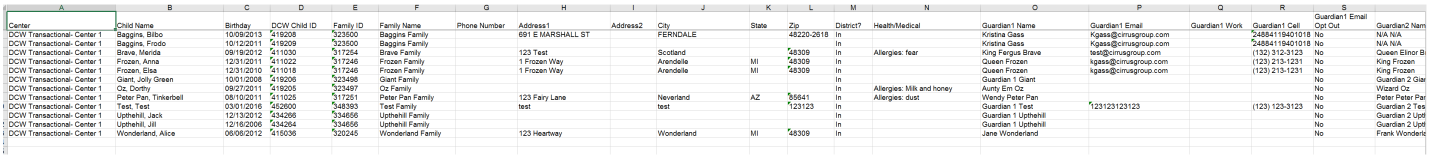
Aunty Em Oz
--

Wendy Peter Pan
123 FAIRY LANE
NEVERLAND, AZ 85641

Guardian 1 Test
TEST
TEST, -- TEST

Guardian 1 Upthehill
--

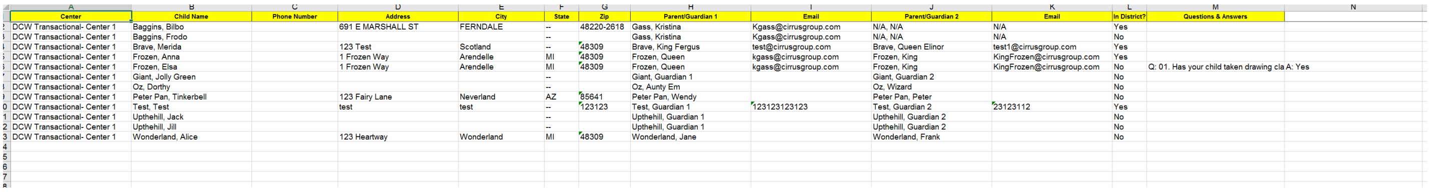
View Excel- view detail in excel including child, parent and contact information



A	B	C	D	E	F	G	H	I	J
Center	Child Name	Birthday	DCW Child ID	Family ID	Family Name	Phone Number	Address1	Address2	City
DCW Transactional- Center 1	Baggins, Bilbo	10/09/2013	419208	323500	Baggins Family		691 E MARSHALL ST		FERNDALE
DCW Transactional- Center 1	Baggins, Frodo	10/12/2011	419209	323500	Baggins Family				
DCW Transactional- Center 1	Brave, Merida	09/19/2012	411030	317254	Brave Family		123 Test		Scotland
DCW Transactional- Center 1	Frozen, Anna	12/31/2011	411022	317246	Frozen Family		1 Frozen Way		Arendelle
DCW Transactional- Center 1	Frozen, Elsa	12/31/2010	411018	317246	Frozen Family		1 Frozen Way		Arendelle
DCW Transactional- Center 1	Giant, Jolly Green	10/01/2008	419206	323498	Giant Family				
DCW Transactional- Center 1	Oz, Dorthy	09/27/2011	419205	323497	Oz Family				
DCW Transactional- Center 1	Peter Pan, Tinkerbell	08/10/2011	411025	317251	Peter Pan Family		123 Fairy Lane		Neverland
DCW Transactional- Center 1	Test, Test	03/01/2016	452600	348393	Test Family		test		test
DCW Transactional- Center 1	Upthehill, Jack	12/13/2012	434266	334656	Upthehill Family				
DCW Transactional- Center 1	Upthehill, Jill	12/16/2006	434264	334656	Upthehill Family				
DCW Transactional- Center 1	Wonderland, Alice	06/06/2012	415036	320245	Wonderland Family		123 Heartway		Wonderland

K	L	M	N	O	P	Q	R	S	
State	Zip	District?	Health/Medical	Guardian1 Name	Guardian1 Email	Guardian1 Work	Guardian1 Cell	Guardian1 Email Opt Out	Guardian2 Nam
	48220-2618	In		Kristina Gass	Kgass@cirrusgroup.com		24884119401018	No	N/A N/A
		In		Kristina Gass	Kgass@cirrusgroup.com		24884119401018	No	N/A N/A
	48309	In	Allergies: fear	King Fergus Brave	test@cirrusgroup.com		(132) 312-3123	No	Queen Elinor B
MI	48309	In		Queen Frozen	kgass@cirrusgroup.com		(123) 213-1231	No	King Frozen
MI	48309	In		Queen Frozen	kgass@cirrusgroup.com		(123) 213-1231	No	King Frozen
		In		Guardian 1 Giant				No	Guardian 2 Gia
		In	Allergies: Milk and honey	Aunty Em Oz				No	Wizard Oz
AZ	85641	In	Allergies: dust	Wendy Peter Pan				No	Peter Peter Pa
	123123	In		Guardian 1 Test	123123123123		(123) 123-3123	No	Guardian 2 Tes
		In		Guardian 1 Upthehill				No	Guardian 2 Upt
		In		Guardian 1 Upthehill				No	Guardian 2 Upt
MI	48309	In		Jane Wonderland				No	Frank Wonderl

View Excel Version 2- an abbreviated view available in excel.



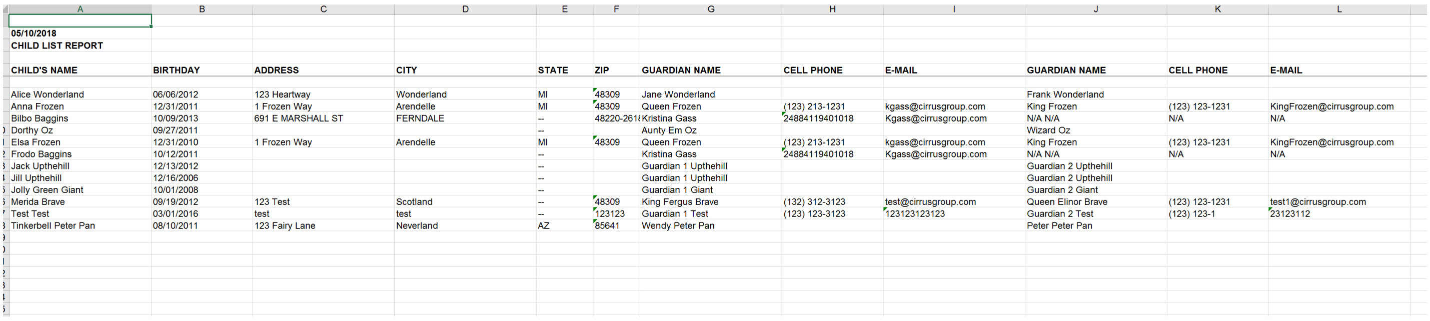
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Center	Child Name	Phone Number	Address	City	State	Zip	Parent/Guardian 1	Email	Parent/Guardian 2	Email	In District?	Questions & Answers	
DCW Transactional- Center 1	Baggins, Bilbo		691 E MARSHALL ST	FERNDALE	--	48220-2618	Gass, Kristina	Kgass@cirrusgroup.com	N/A, N/A	N/A	Yes		
DCW Transactional- Center 1	Baggins, Frodo				--		Gass, Kristina	Kgass@cirrusgroup.com	N/A, N/A	N/A	No		
DCW Transactional- Center 1	Brave, Merida		123 Test	Scotland	--	48309	Brave, King Fergus	test@cirrusgroup.com	Brave, Queen Elinor	test1@cirrusgroup.com	Yes		
DCW Transactional- Center 1	Frozen, Anna		1 Frozen Way	Arendelle	MI	48309	Frozen, Queen	kgass@cirrusgroup.com	Frozen, King	KingFrozen@cirrusgroup.com	Yes		
DCW Transactional- Center 1	Frozen, Elsa		1 Frozen Way	Arendelle	MI	48309	Frozen, Queen	kgass@cirrusgroup.com	Frozen, King	KingFrozen@cirrusgroup.com	No	Q: 01. Has your child taken drawing cla	A: Yes
DCW Transactional- Center 1	Giant, Jolly Green				--		Giant, Guardian 1		Giant, Guardian 2		No		
DCW Transactional- Center 1	Oz, Dorthy				--		Oz, Aunty Em		Oz, Wizard		No		
DCW Transactional- Center 1	Peter Pan, Tinkerbell		123 Fairy Lane	Neverland	AZ	85641	Peter Pan, Wendy		Peter Pan, Peter		No		
DCW Transactional- Center 1	Test, Test		test	test	--	123123	Test, Guardian 1	123123123123	Test, Guardian 2	23123112	Yes		
DCW Transactional- Center 1	Upthehill, Jack				--		Upthehill, Guardian 1		Upthehill, Guardian 2		No		
DCW Transactional- Center 1	Upthehill, Jill				--		Upthehill, Guardian 1		Upthehill, Guardian 2		No		
DCW Transactional- Center 1	Wonderland, Alice		123 Heartway	Wonderland	MI	48309	Wonderland, Jane		Wonderland, Frank		No		

View Registration Questions as PDF- view individual registration questions per child.

Registration Q&A

Name: Frozen, Elsa			Grade: Kindergarten	DOB: 12/31/2010
Address: 1 Frozen Way			Gender: Female	Registration Date: 12/22/2017
City: Arendelle	State: MI	Zip: 48309	Home Ph:	Center: DCW Transactional- Center 1
01. Has your child taken drawing classes before?			Yes	
Electronic Signature (Guardian 1)				Date: 12/22/2017
Electronic Signature (Guardian 2)				Date: 12/22/2017

Child List (excel)



05/10/2018
CHILD LIST REPORT

CHILD'S NAME	BIRTHDAY	ADDRESS	CITY	STATE	ZIP	GUARDIAN NAME	CELL PHONE	E-MAIL	GUARDIAN NAME	CELL PHONE	E-MAIL
Alice Wonderland	06/06/2012	123 Heartway	Wonderland	MI	48309	Jane Wonderland			Frank Wonderland		
Anna Frozen	12/31/2011	1 Frozen Way	Arendelle	MI	48309	Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com
Bilbo Baggins	10/09/2013	691 E MARSHALL ST	FERNDALE	--	48220-261	Kristina Gass	24884119401018	Kgass@cirrusgroup.com	N/A N/A	N/A	N/A
Dorthy Oz	09/27/2011			--		Aunty Em Oz			Wizard Oz		
Elsa Frozen	12/31/2010	1 Frozen Way	Arendelle	MI	48309	Queen Frozen	(123) 213-1231	kgass@cirrusgroup.com	King Frozen	(123) 123-1231	KingFrozen@cirrusgroup.com
Frodo Baggins	10/12/2011			--		Kristina Gass	24884119401018	Kgass@cirrusgroup.com	N/A N/A	N/A	N/A
Jack Upthehill	12/13/2012			--		Guardian 1 Upthehill			Guardian 2 Upthehill		
Jill Upthehill	12/16/2006			--		Guardian 1 Upthehill			Guardian 2 Upthehill		
Jolly Green Giant	10/01/2008			--		Guardian 1 Giant			Guardian 2 Giant		
Merida Brave	09/19/2012	123 Test	Scotland	--	48309	King Fergus Brave	(132) 312-3123	test@cirrusgroup.com	Queen Elinor Brave	(123) 123-1231	test1@cirrusgroup.com
Test Test	03/01/2016	test	test	--	123123	Guardian 1 Test	(123) 123-3123	123123123123	Guardian 2 Test	(123) 123-1	23123112
Tinkerbell Peter Pan	08/10/2011	123 Fairy Lane	Neverland	AZ	85641	Wendy Peter Pan			Peter Peter Pan		

Child List (PDF)

DCW - Transactional
445 S. Livernois
Rochester MI 48307

Child Directory

Alice Wonderland
06/06/2012
123 Heartway
Wonderland,MI 48309
Jane Wonderland

Frank Wonderland

Anna Frozen
12/31/2011
1 Frozen Way
Arendelle,MI 48309
Queen Frozen
(123) 213-1231
kgass@cirrusgroup.com
King Frozen
(123) 123-1231
KingFrozen@cirrusgroup.com

Bilbo Baggins
10/09/2013
691 E MARSHALL ST
FERNDALE,-- 48220-2618
Kristina Gass
24884119401018
Kgass@cirrusgroup.com
N/A N/A
N/A
N/A

Dorthy Oz
09/27/2011

,--
Aunty Em Oz

Wizard Oz

Elsa Frozen
12/31/2010
1 Frozen Way
Arendelle,MI 48309
Queen Frozen
(123) 213-1231
kgass@cirrusgroup.com
King Frozen
(123) 123-1231
KingFrozen@cirrusgroup.com

Frodo Baggins
10/12/2011

,--
Kristina Gass
24884119401018
Kgass@cirrusgroup.com
N/A N/A
N/A
N/A

Jack Upthehill
12/13/2012

,--
Guardian 1 Upthehill

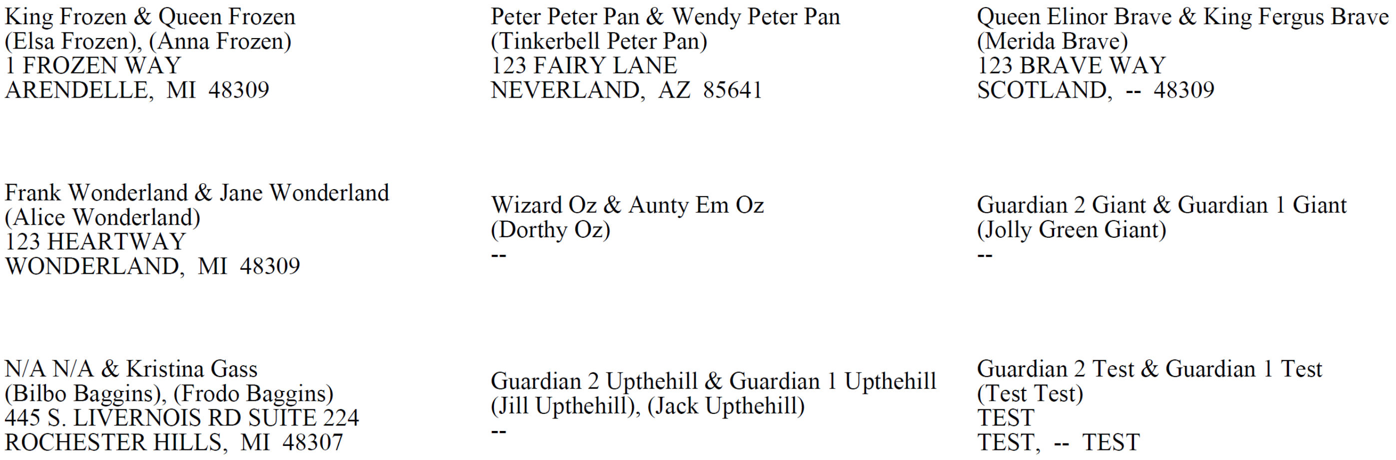
Guardian 2 Upthehill

Jill Upthehill
12/16/2006

,--
Guardian 1 Upthehill

Guardian 2 Upthehill

Combined Mail- 5160



King Frozen & Queen Frozen
(Elsa Frozen), (Anna Frozen)
1 FROZEN WAY
ARENDELLE, MI 48309

Peter Peter Pan & Wendy Peter Pan
(Tinkerbell Peter Pan)
123 FAIRY LANE
NEVERLAND, AZ 85641

Queen Elinor Brave & King Fergus Brave
(Merida Brave)
123 BRAVE WAY
SCOTLAND, -- 48309

Frank Wonderland & Jane Wonderland
(Alice Wonderland)
123 HEARTWAY
WONDERLAND, MI 48309

Wizard Oz & Aunty Em Oz
(Dorthy Oz)
--

Guardian 2 Giant & Guardian 1 Giant
(Jolly Green Giant)
--

N/A N/A & Kristina Gass
(Bilbo Baggins), (Frodo Baggins)
445 S. LIVERNOIS RD SUITE 224
ROCHESTER HILLS, MI 48307

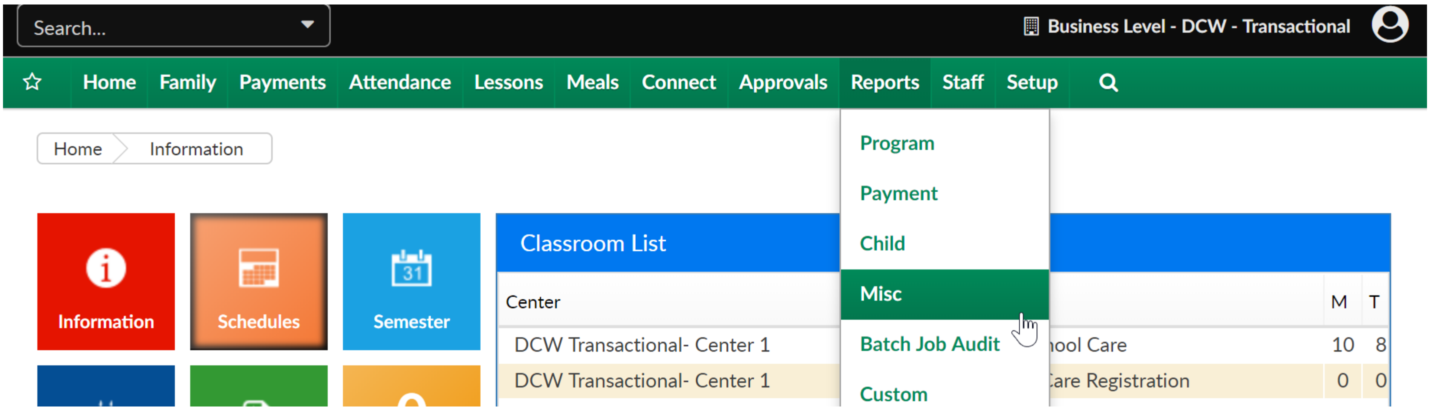
Guardian 2 Upthehill & Guardian 1 Upthehill
(Jill Upthehill), (Jack Upthehill)
--

Guardian 2 Test & Guardian 1 Test
(Test Test)
TEST
TEST, -- TEST

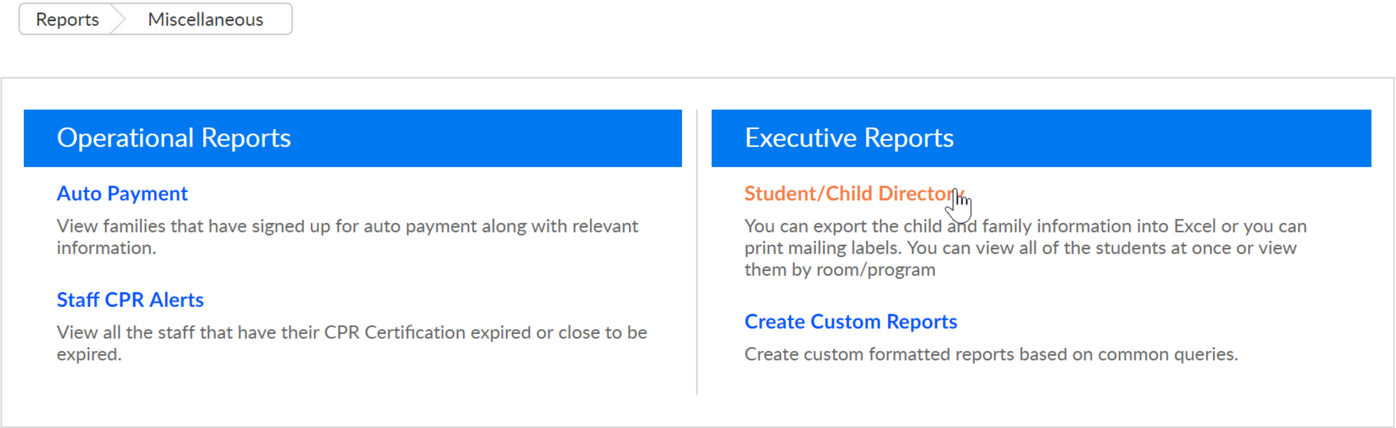
Family- How do I create mail labels?

Last Modified on 03/07/2018 4:11 pm EST

To create mailing labels, go to Reports > Misc



Then select Student/Child Directory-



Operational Reports

Auto Payment

View families that have signed up for auto payment along with relevant information.

Staff CPR Alerts

View all the staff that have their CPR Certification expired or close to be expired.

Executive Reports

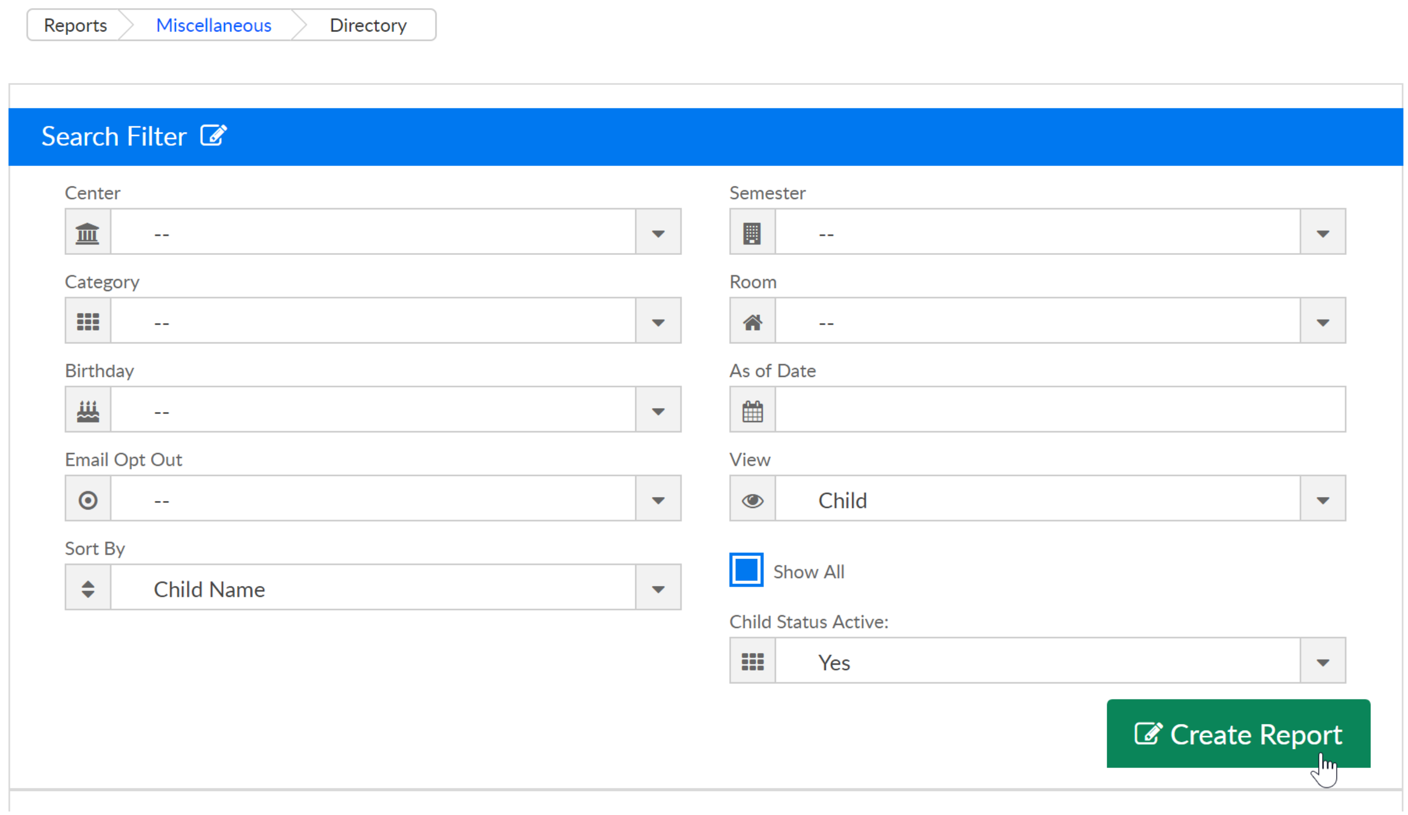
Student/Child Directory

You can export the child and family information into Excel or you can print mailing labels. You can view all of the students at once or view them by room/program

Create Custom Reports

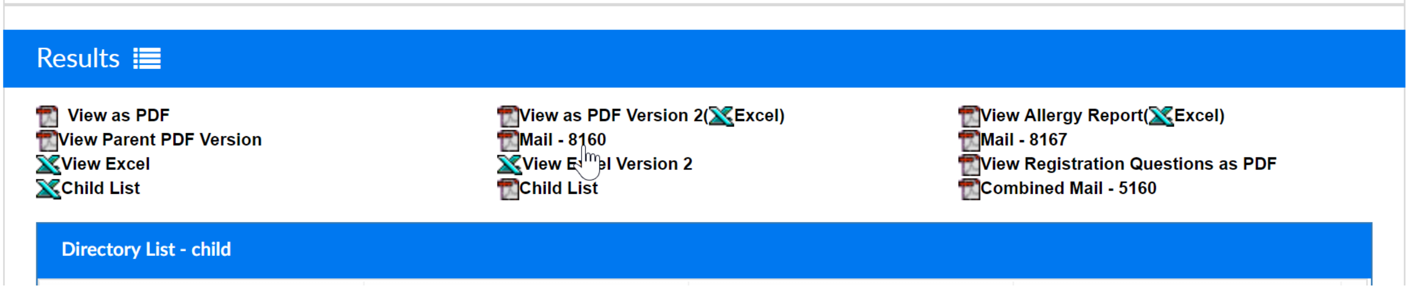
Create custom formatted reports based on common queries.

Enter search criteria, then press Create Report.



Center: --
Category: --
Birthday: --
Email Opt Out: --
Sort By: Child Name
Semester: --
Room: --
As of Date:
View: Child
☑ Show All
Child Status Active: Yes

Select the Mail- 8160 or Mail- 8167 option.

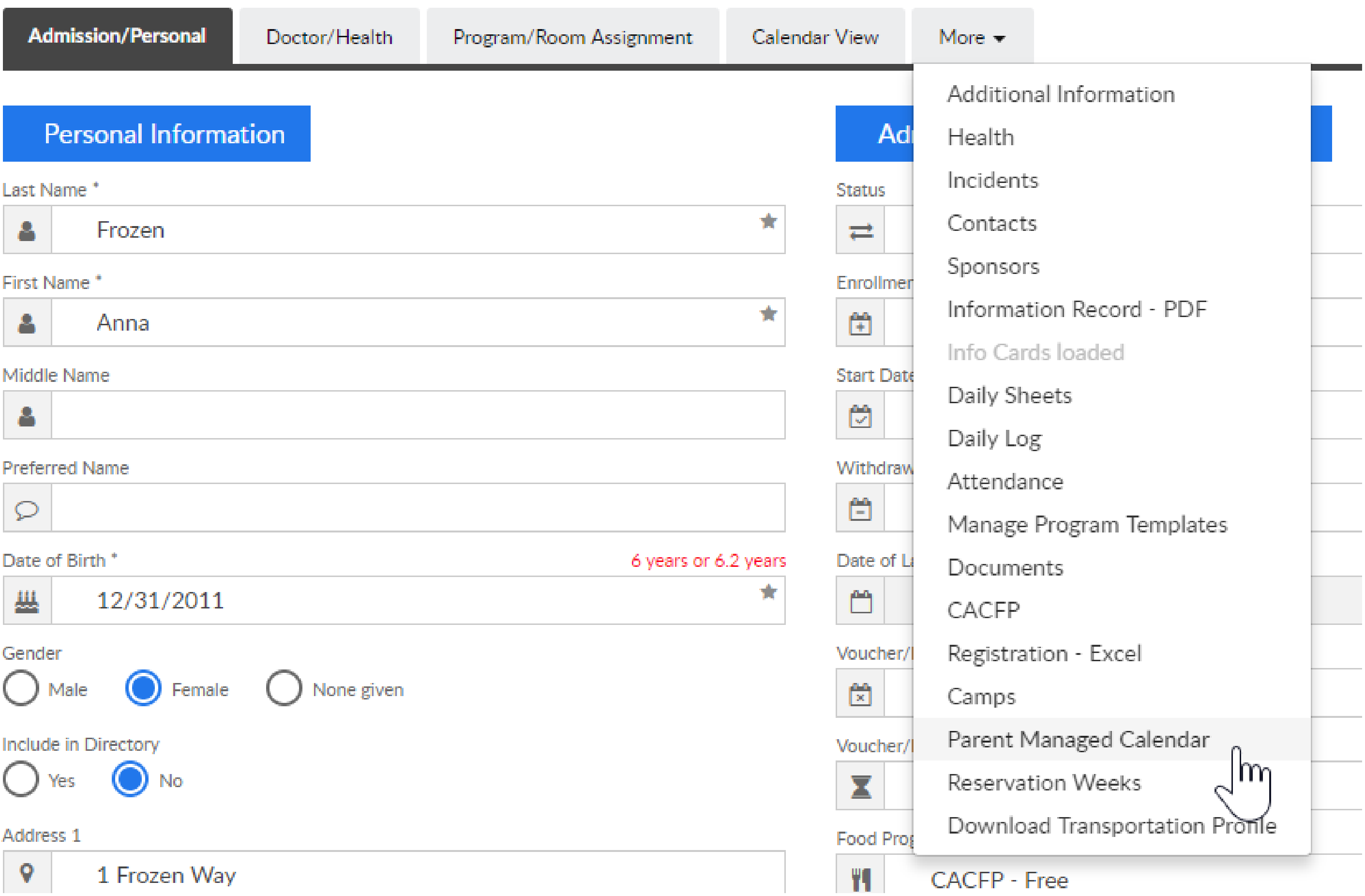


Family- How do I add a day for a child from a parent managed calendar?

Last Modified on 06/28/2018 2:16 pm EDT

From the admin side days can be added for children involved in parent managed programs. To add a day to a child's record, the child must already be associated with the parent managed registration room.

On the family record, select the child tab. Then select the More drop down menu and select the Parent Managed Calendar link-



Last Name * Frozen

First Name * Anna

Middle Name

Preferred Name

Date of Birth * 12/31/2011 6 years or 6.2 years

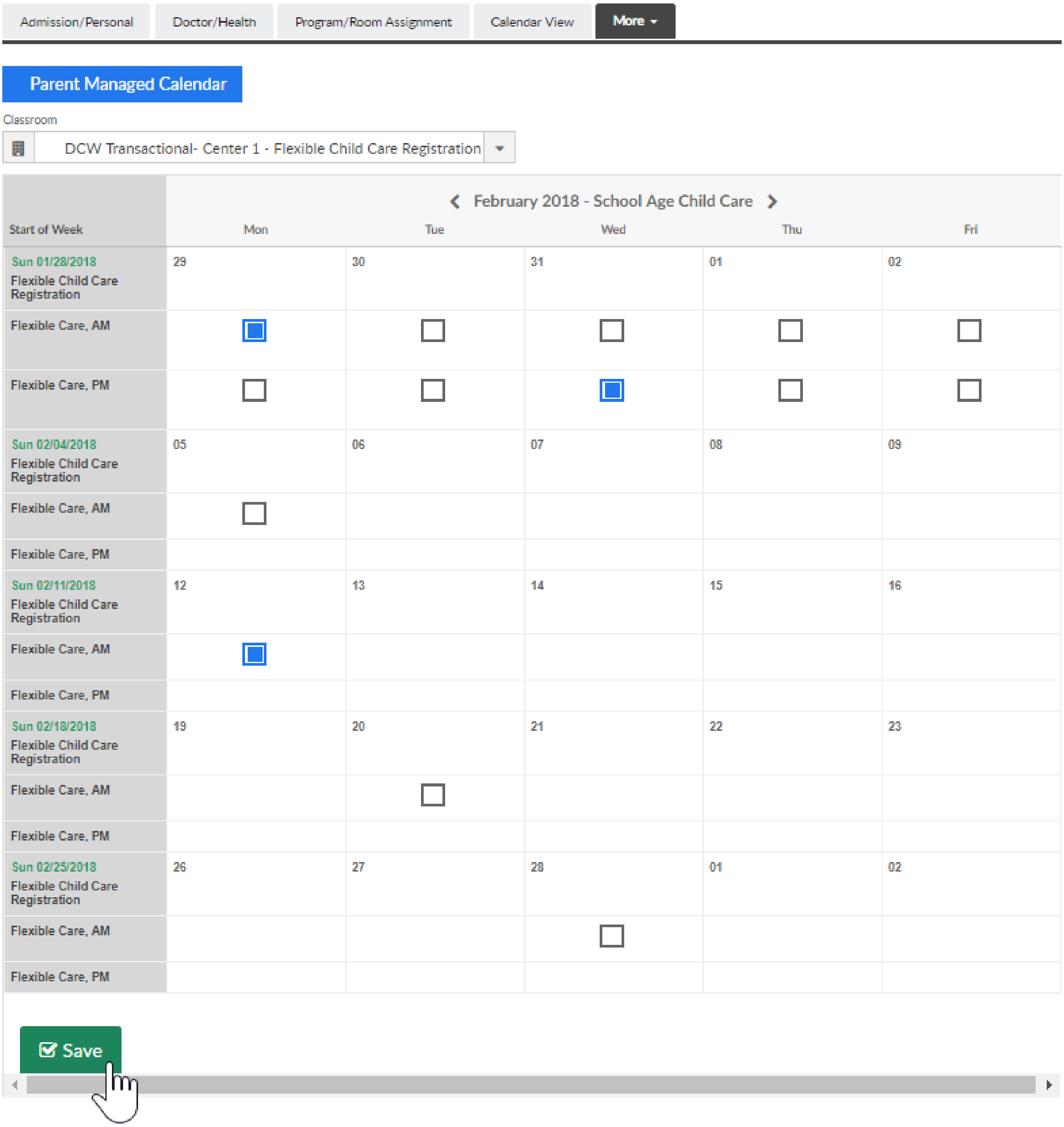
Gender ○ Male ● Female ○ None given

Include in Directory ○ Yes ● No

Address 1 1 Frozen Way

CACFP - Free

Check the days the child should be registered for, then press save. Adding days from the admin side will automatically bill the parent for the days selected. The financial ledger will display the total due for the selections that have been made.



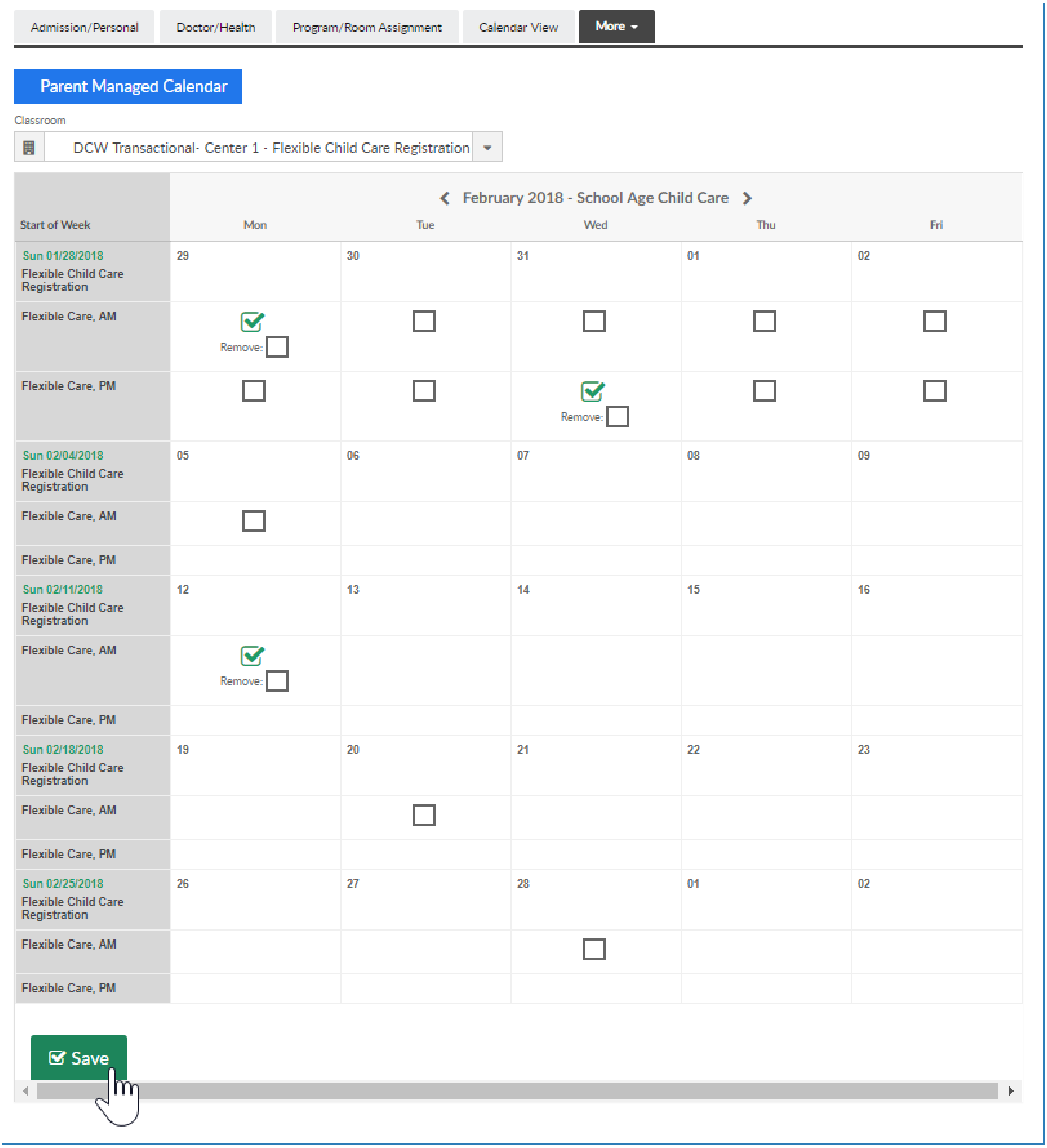
Classroom

DCW Transactional- Center 1 - Flexible Child Care Registration

February 2018 - School Age Child Care

Start of Week	Mon	Tue	Wed	Thu	Fri
Sun 01/28/2018 Flexible Child Care Registration	29	30	31	01	02
Flexible Care, AM	☑	☐	☐	☐	☐
Flexible Care, PM	☐	☐	☑	☐	☐
Sun 02/04/2018 Flexible Child Care Registration	05	06	07	08	09
Flexible Care, AM	☐				
Flexible Care, PM					
Sun 02/11/2018 Flexible Child Care Registration	12	13	14	15	16
Flexible Care, AM	☑				
Flexible Care, PM					
Sun 02/18/2018 Flexible Child Care Registration	19	20	21	22	23
Flexible Care, AM		☐			
Flexible Care, PM					
Sun 02/25/2018 Flexible Child Care Registration	26	27	28	01	02
Flexible Care, AM			☐		
Flexible Care, PM					

Once the page updates, the days that have been selected with display with a green check mark-

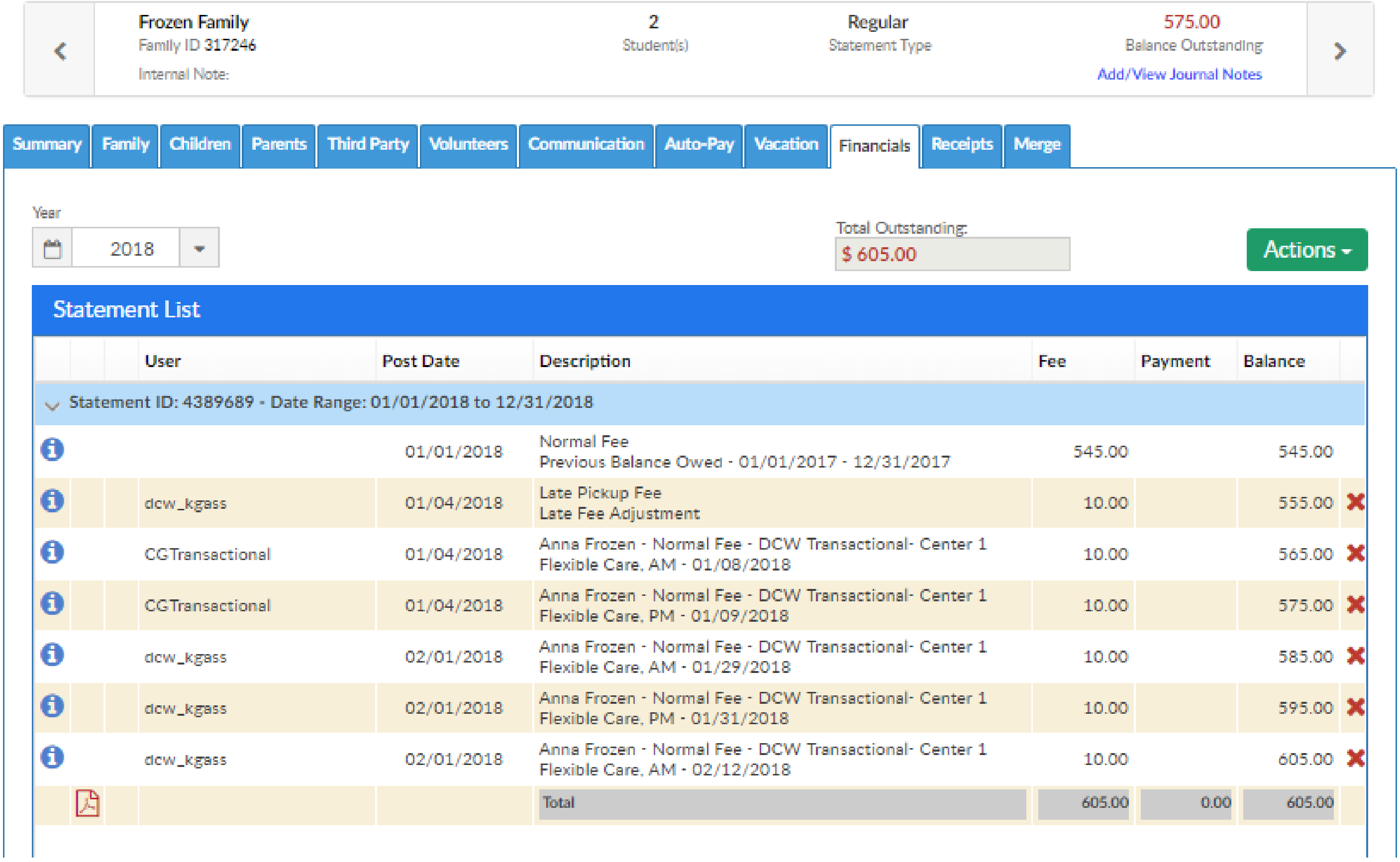


Classroom: DCW Transactional- Center 1 - Flexible Child Care Registration

February 2018 - School Age Child Care

Start of Week	Mon	Tue	Wed	Thu	Fri
Sun 01/28/2018 Flexible Child Care Registration	29	30	31	01	02
Flexible Care, AM	☑ Remove: ☐	☐	☐	☐	☐
Flexible Care, PM	☐	☐	☑ Remove: ☐	☐	☐
Sun 02/04/2018 Flexible Child Care Registration	05	06	07	08	09
Flexible Care, AM	☐				
Flexible Care, PM					
Sun 02/11/2018 Flexible Child Care Registration	12	13	14	15	16
Flexible Care, AM	☑ Remove: ☐				
Flexible Care, PM					
Sun 02/18/2018 Flexible Child Care Registration	19	20	21	22	23
Flexible Care, AM		☐			
Flexible Care, PM					
Sun 02/25/2018 Flexible Child Care Registration	26	27	28	01	02
Flexible Care, AM			☐		
Flexible Care, PM					

Family financial ledger-



Frozen Family
Family ID 317246
Internal Note:

2
Student(s)

Regular
Statement Type

575.00
Balance Outstanding
Add/View Journal Notes

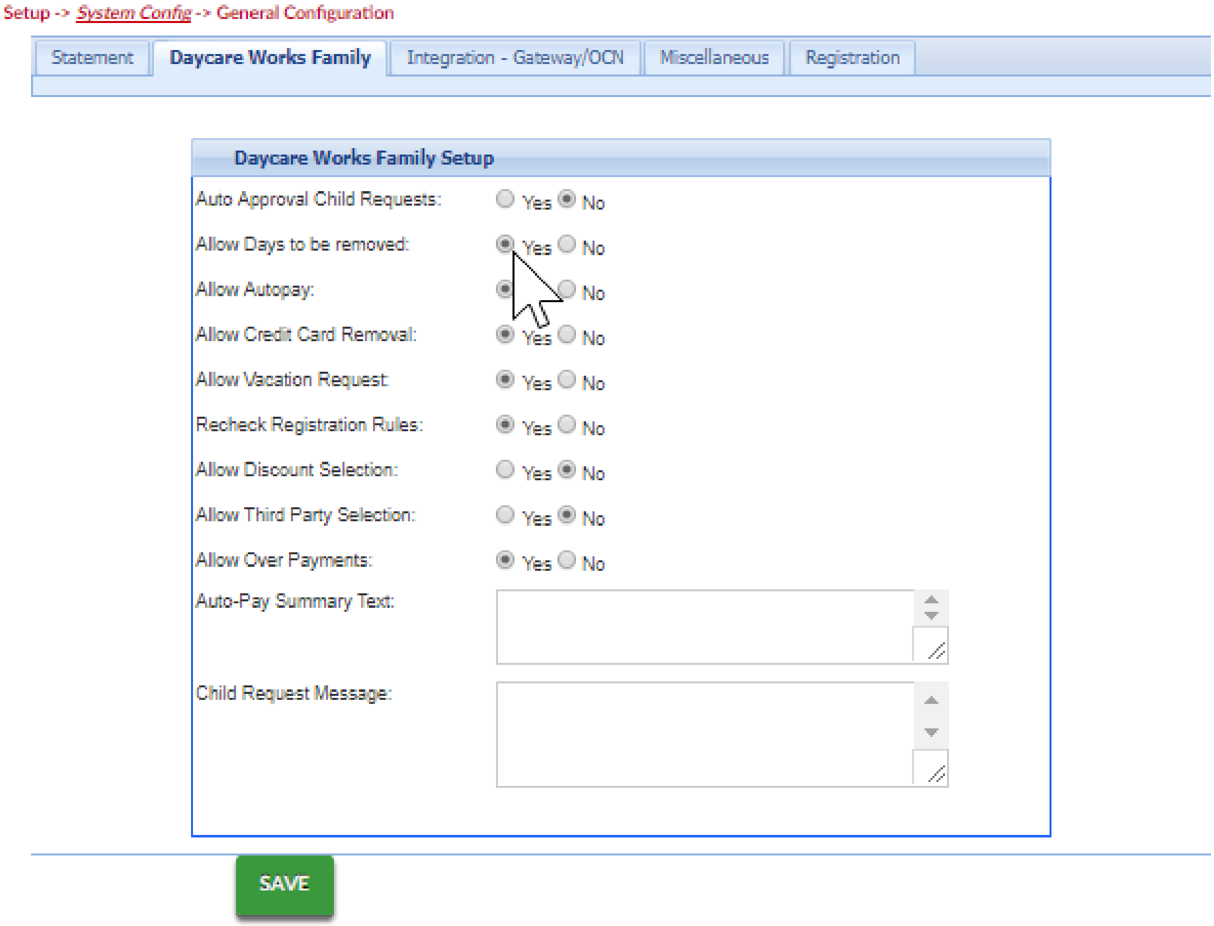
Year: 2018

Total Outstanding: $ 605.00

Statement List

			User	Post Date	Description	Fee	Payment	Balance	
Statement ID: 4389689 - Date Range: 01/01/2018 to 12/31/2018									
ⓘ				01/01/2018	Normal Fee Previous Balance Owed - 01/01/2017 - 12/31/2017	545.00		545.00	
ⓘ			dcw_kgass	01/04/2018	Late Pickup Fee Late Fee Adjustment	10.00		555.00	✖
ⓘ			CGTransactional	01/04/2018	Anna Frozen - Normal Fee - DCW Transactional- Center 1 Flexible Care, AM - 01/08/2018	10.00		565.00	✖
ⓘ			CGTransactional	01/04/2018	Anna Frozen - Normal Fee - DCW Transactional- Center 1 Flexible Care, PM - 01/09/2018	10.00		575.00	✖
ⓘ			dcw_kgass	02/01/2018	Anna Frozen - Normal Fee - DCW Transactional- Center 1 Flexible Care, AM - 01/29/2018	10.00		585.00	✖
ⓘ			dcw_kgass	02/01/2018	Anna Frozen - Normal Fee - DCW Transactional- Center 1 Flexible Care, PM - 01/31/2018	10.00		595.00	✖
ⓘ			dcw_kgass	02/01/2018	Anna Frozen - Normal Fee - DCW Transactional- Center 1 Flexible Care, AM - 02/12/2018	10.00		605.00	✖
					Total	605.00	0.00	605.00	

Note: on this screen the remove option displays, if you want to be able to remove days for children or have parents able to remove days go to setup > system config, general config- family tab and then change the option for allowing removal of days -



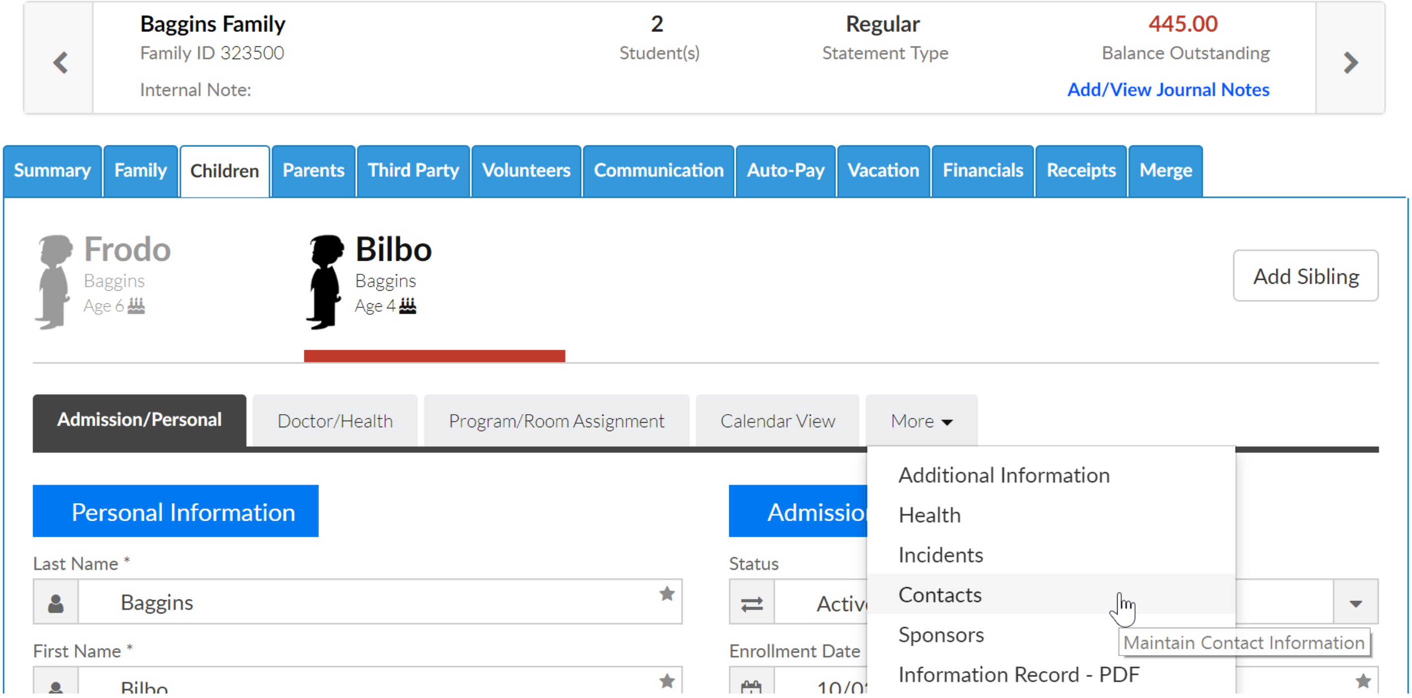
Daycare Works Family Setup

Auto Approval Child Requests: ○ Yes ● No
Allow Days to be removed: ● Yes ○ No
Allow Autopay: ● Yes ○ No
Allow Credit Card Removal: ● Yes ○ No
Allow Vacation Request: ● Yes ○ No
Recheck Registration Rules: ● Yes ○ No
Allow Discount Selection: ○ Yes ● No
Allow Third Party Selection: ○ Yes ● No
Allow Over Payments: ● Yes ○ No
Auto-Pay Summary Text:
Child Request Message:

Family- How do I add a contact as a payer?

Last Modified on 05/10/2018 1:37 pm EDT

Navigate to the family record screen, select the more menu from the child tab. Then select the contacts option.



Baggins Family
Family ID 323500
Internal Note:

2 Student(s)

Regular Statement Type

445.00 Balance Outstanding

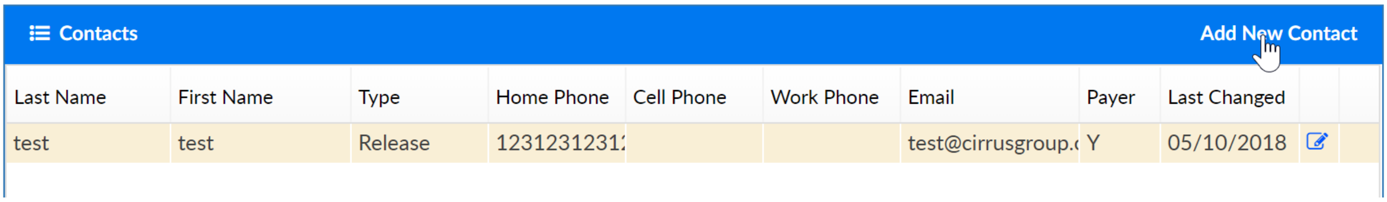
Last Name * Baggins

First Name * Bilbo

Status Activ

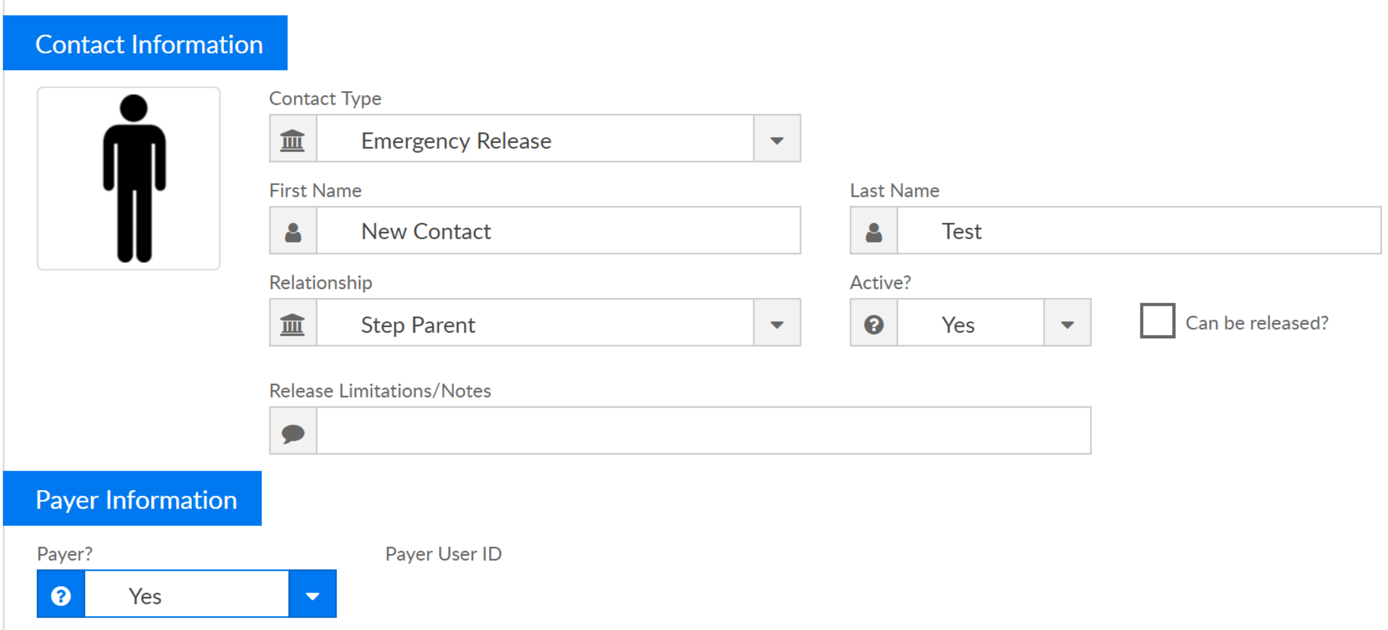
Enrollment Date 10/0

To add a new contact click the add new contact link-



Last Name	First Name	Type	Home Phone	Cell Phone	Work Phone	Email	Payer	Last Changed
test	test	Release	12312312312			test@cirrusgroup.c	Y	05/10/2018

Then scroll to the empty contact information fields. Be sure to select Yes from the payer? drop down menu. Complete the record- including email address then press save.



Contact Type: Emergency Release

First Name: New Contact

Last Name: Test

Relationship: Step Parent

Active?: Yes

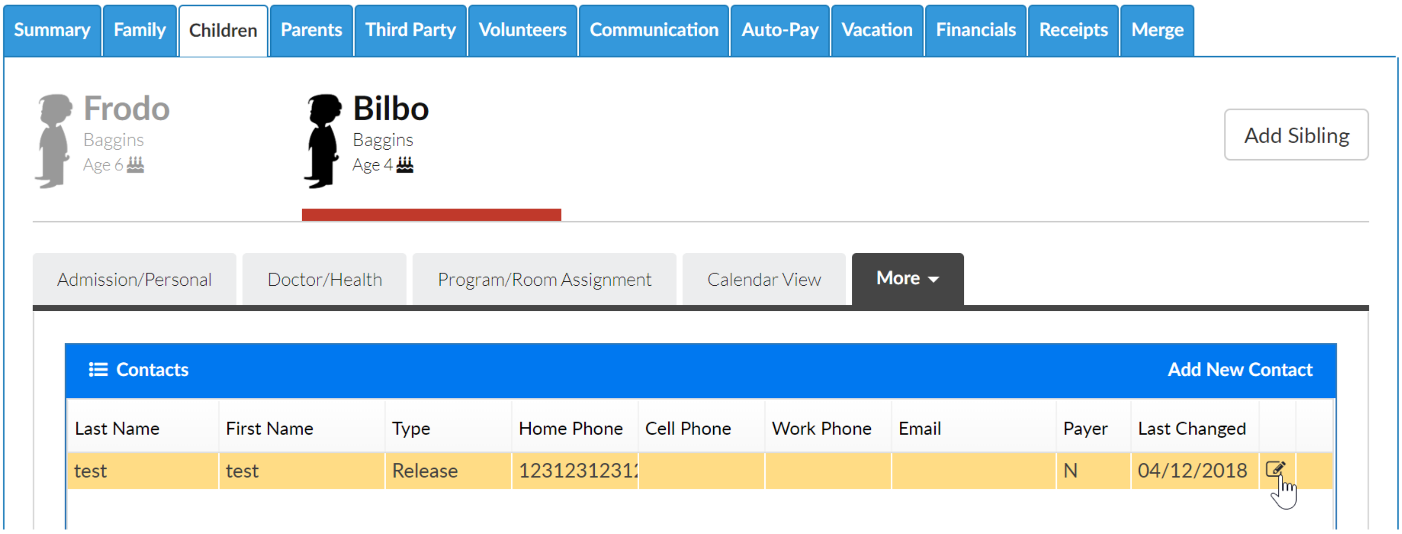
☐ Can be released?

Release Limitations/Notes:

Payer?: Yes

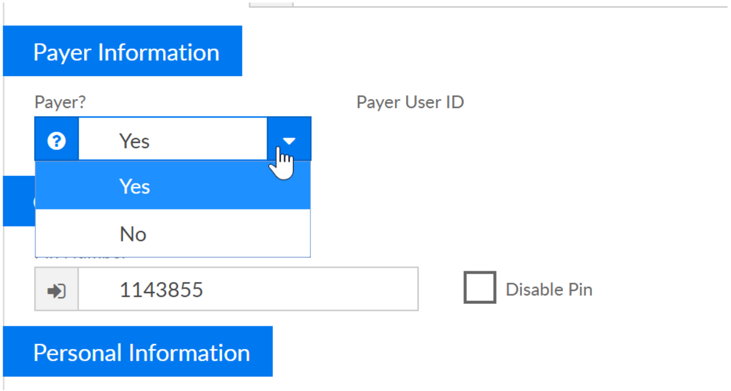
Payer User ID

To edit an existing contact click the edit icon-



Last Name	First Name	Type	Home Phone	Cell Phone	Work Phone	Email	Payer	Last Changed
test	test	Release	12312312312				N	04/12/2018

Under payer information, select Yes- then press save.



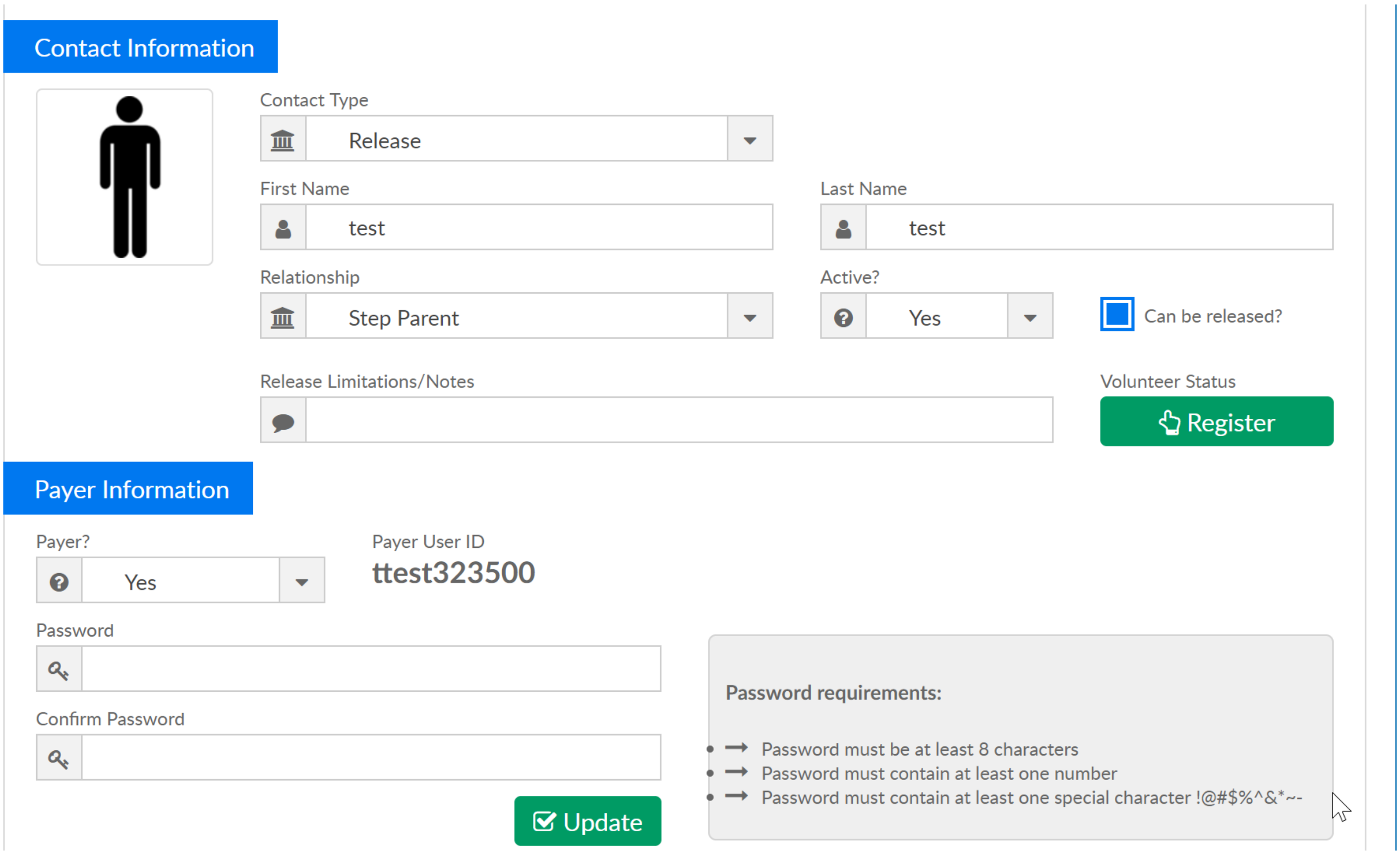
Payer?: Yes

Payer User ID

1143855

☐ Disable Pin

After pressing save, the user ID and password will automatically be set. Provide this to the contact or the parent to allow the new paying contact to login.



Contact Type: Release

First Name: test

Last Name: test

Relationship: Step Parent

Active?: Yes

☑ Can be released?

Release Limitations/Notes:

Volunteer Status

Payer?: Yes

Payer User ID: ttest323500

Password:

Confirm Password:

Password requirements:

- → Password must be at least 8 characters
- → Password must contain at least one number
- → Password must contain at least one special character !@#$%^&*~-

By default the payer will be added to the system with the Family Portal Contacts (Not Allowed) role on the setup > admins, actions > setup roles area.

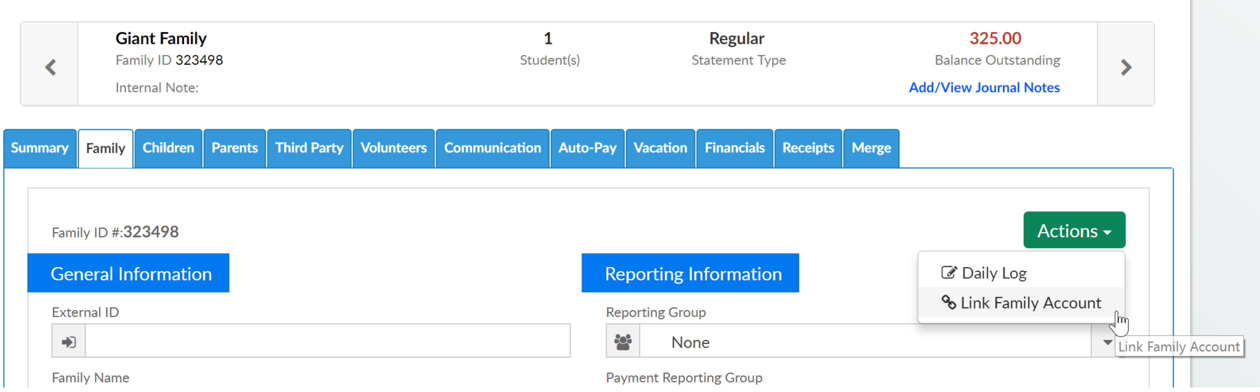
Family- How do I link family accounts?

Last Modified on 01/26/2018 10:16 am EST

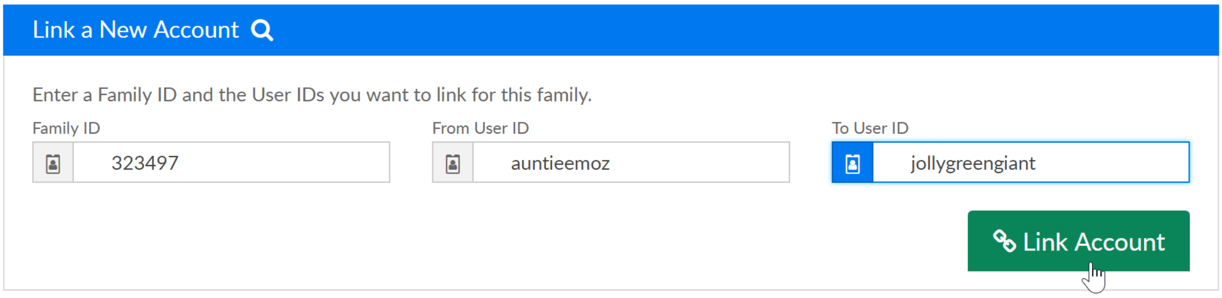
Linking family accounts will allow parents to login with either of their usernames and passwords (on separate accounts) and switch between their separate families.

To link family accounts go to the family record and select the family tab.

Then select the actions menu-



Enter the family ID of the family you are linking from and then the IDs that will be linked from and to-



Link a New Account

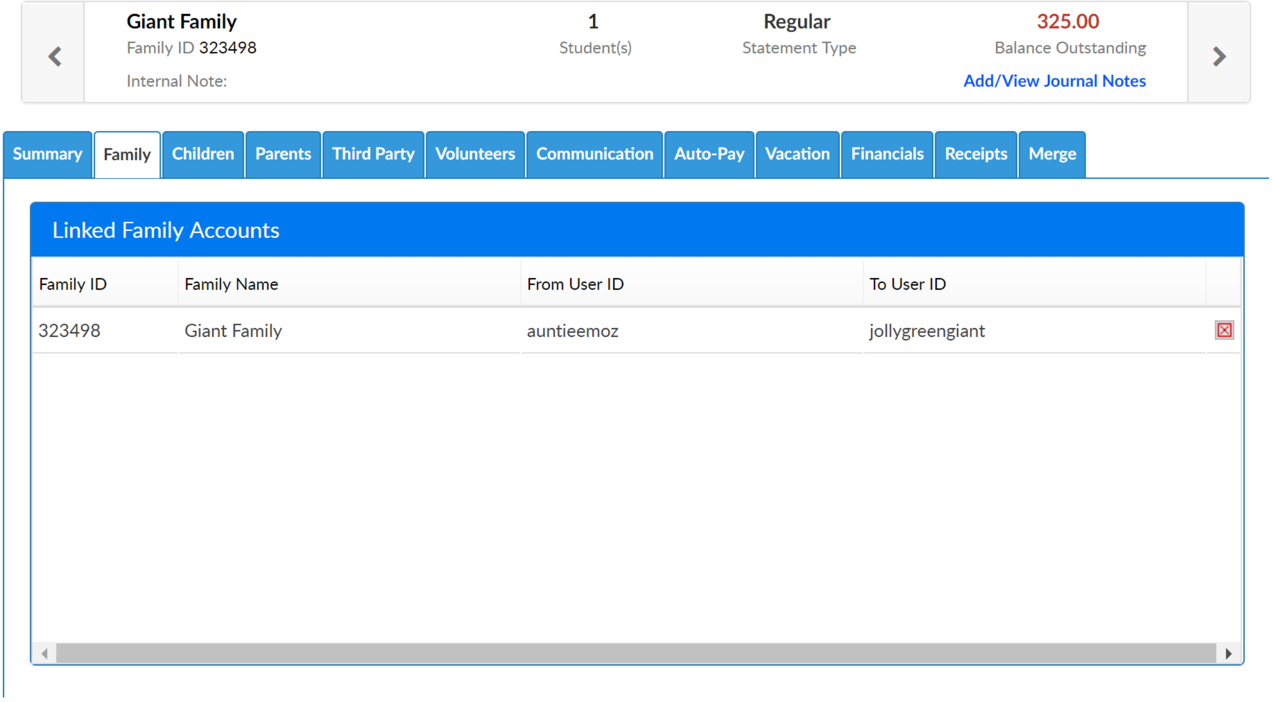
Enter a Family ID and the User IDs you want to link for this family.

Family ID: 323497

From User ID: auntieemoz

To User ID: jollygreengiant

Linked family information will display in the Linked Family Accounts box-



Giant Family
Family ID 323498
Internal Note:

1 Student(s)

Regular Statement Type

325.00 Balance Outstanding

Linked Family Accounts

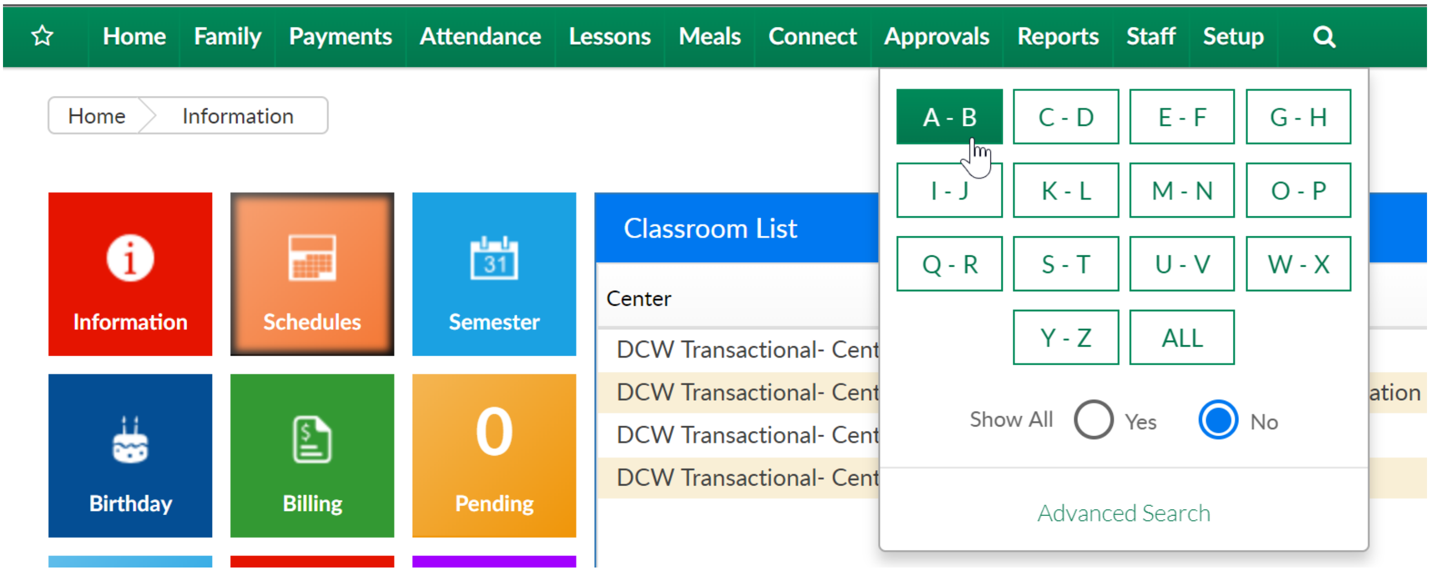
Family ID	Family Name	From User ID	To User ID	
323498	Giant Family	auntieemoz	jollygreengiant	☒

When the parent logs into the portal they will be able to switch between their two accounts.

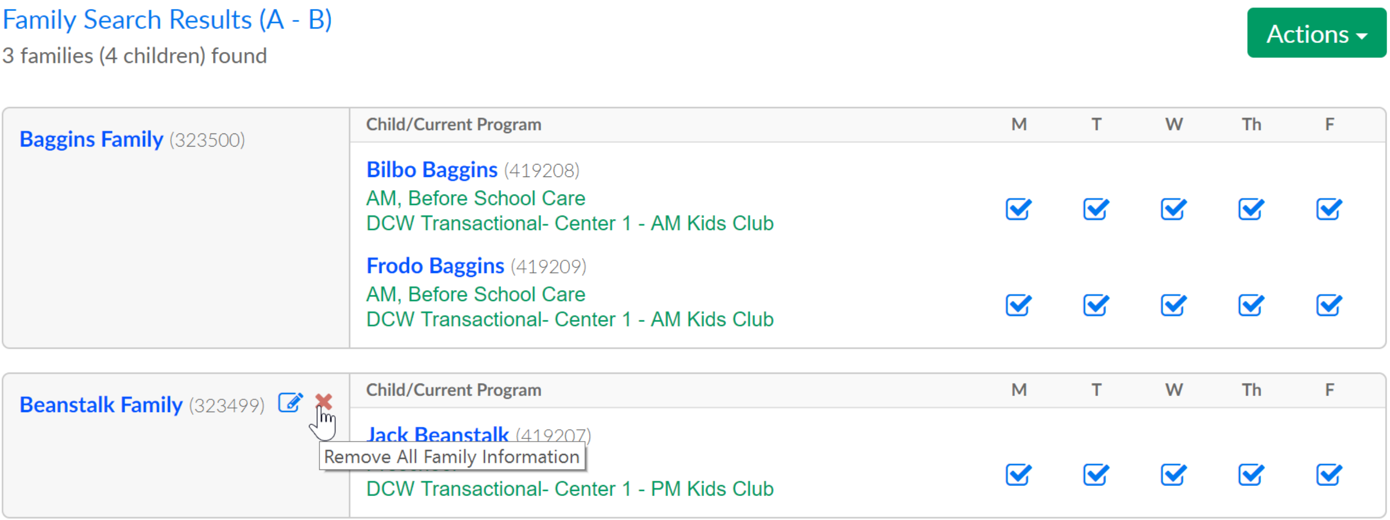
Family- How do I delete a family?

Last Modified on 06/28/2018 2:17 pm EDT

If a family was entered into the system incorrectly you can search for the family by selecting the magnifying glass from the menu.



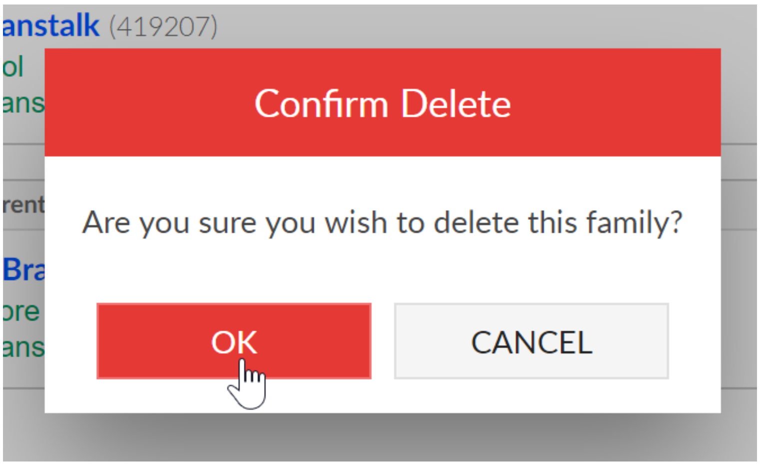
On the Family Search Results screen, select the red x next to the family name to delete.



Family Search Results (A - B)
3 families (4 children) found

	Child/Current Program	M	T	W	Th	F
Baggins Family (323500)	**Bilbo Baggins** (419208) AM, Before School Care DCW Transactional- Center 1 - AM Kids Club	☑	☑	☑	☑	☑
	Frodo Baggins (419209) AM, Before School Care DCW Transactional- Center 1 - AM Kids Club	☑	☑	☑	☑	☑
Beanstalk Family (323499)	**Jack Beanstalk** (419207) DCW Transactional- Center 1 - PM Kids Club	☑	☑	☑	☑	☑

Then select OK



Are you sure you wish to delete this family?

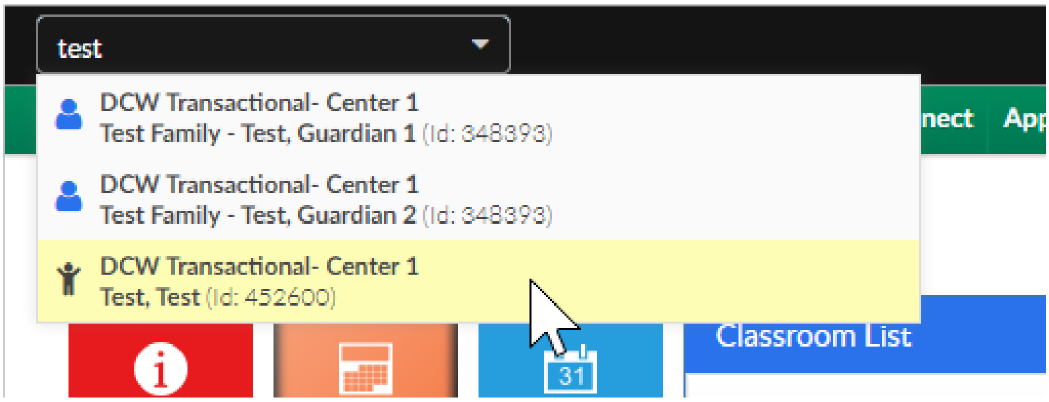
If a family has charges, fees, credits or payments on their financial ledger they cannot be deleted.

If a family was entered into the system more than once and you want to merge the family records, you can do so by following these directions .

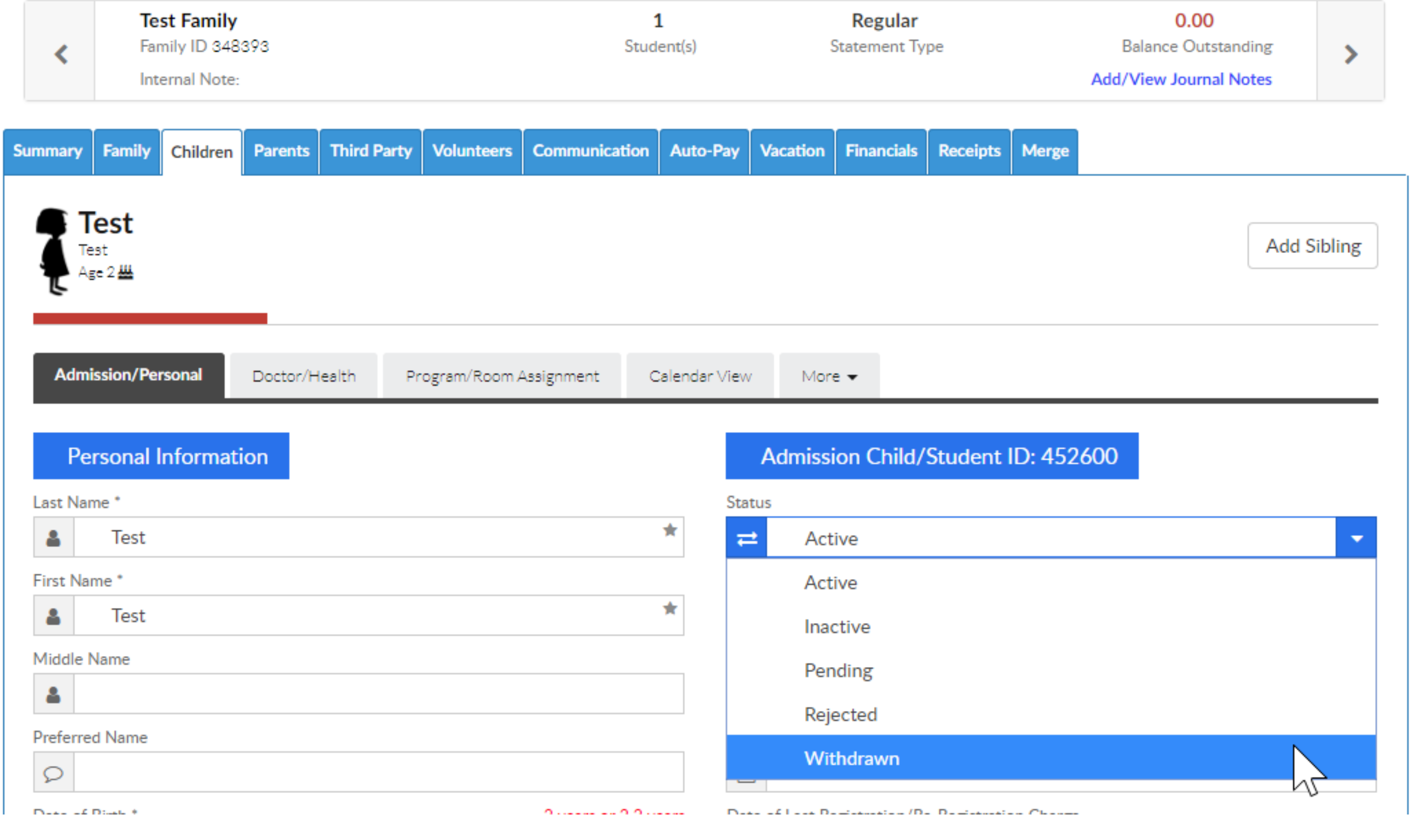
Family- How do I withdraw a child?

Last Modified on 06/28/2018 2:19 pm EDT

Go to the family record by searching for the child's name in the top left search bar or by using the magnifying glass on the main menu bar.



Change the child's status to withdrawn and enter the withdrawal date. Then press save at the bottom of the page.



When you enter the withdrawal date this automatically end dates the child's current and future program/room assignments to the date that has been entered.

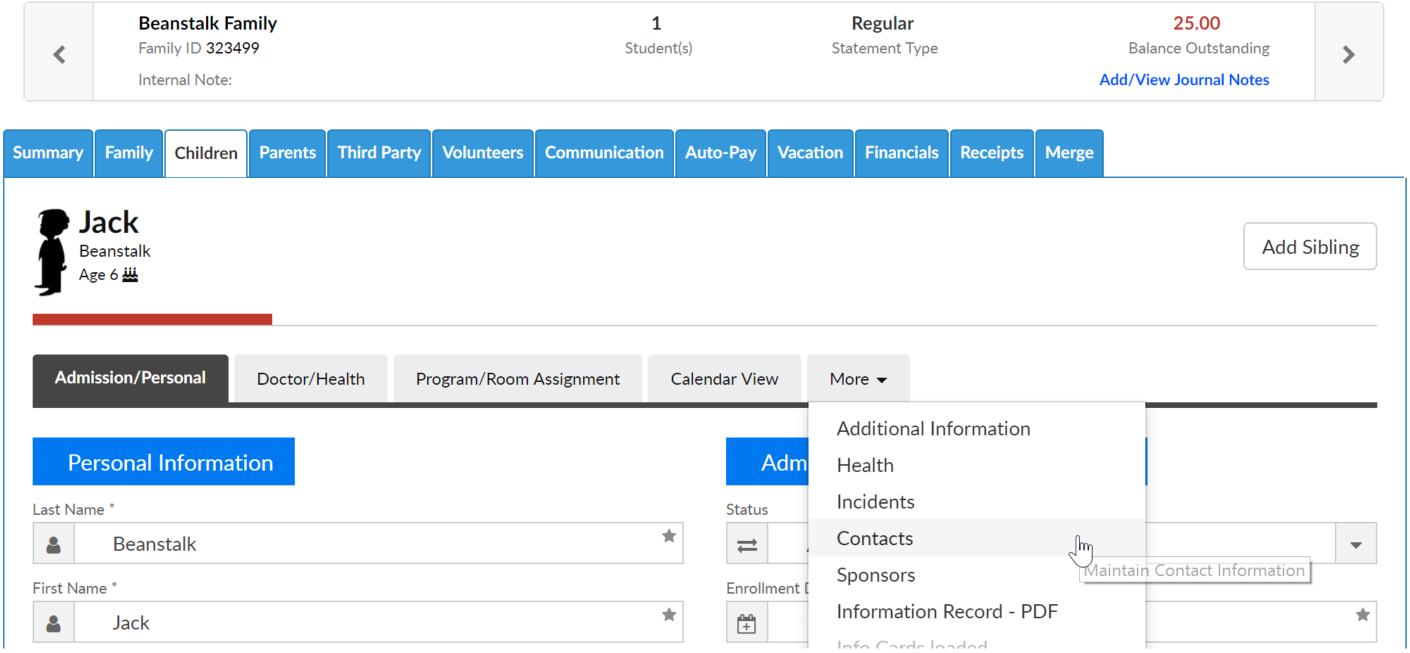
If the family should no longer be active, go to the family tab and remove the check from the active box- then press save.

Family- How do I add a contact from the admin side?

Last Modified on 05/10/2018 1:28 pm EDT

To add, edit or deactivate contacts for children/families- go to a family record, then select the child tab.

On the child tab select the More option, then select Contacts.



Last Name *: Beanstalk

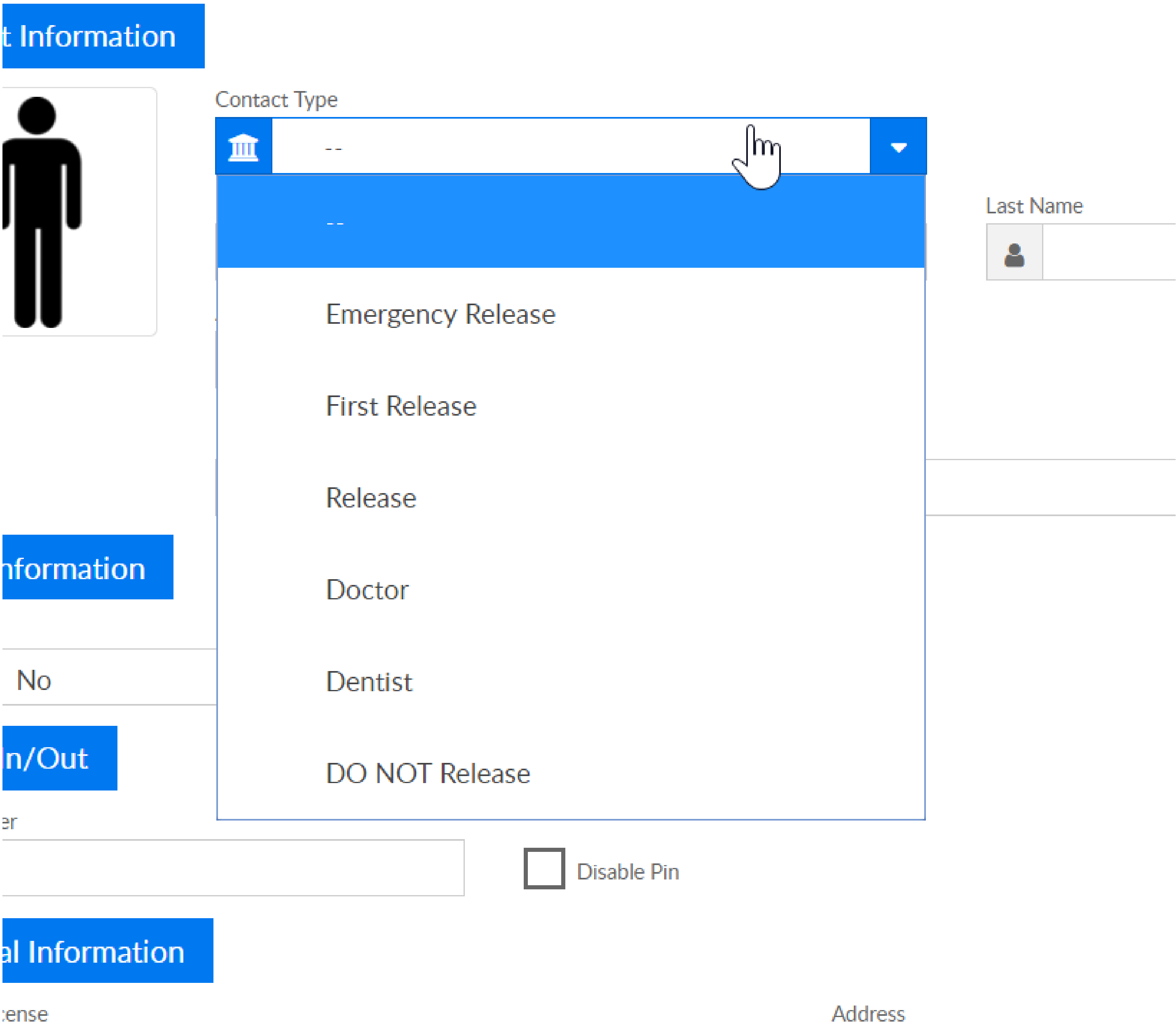
First Name *: Jack

Status

Enrollment

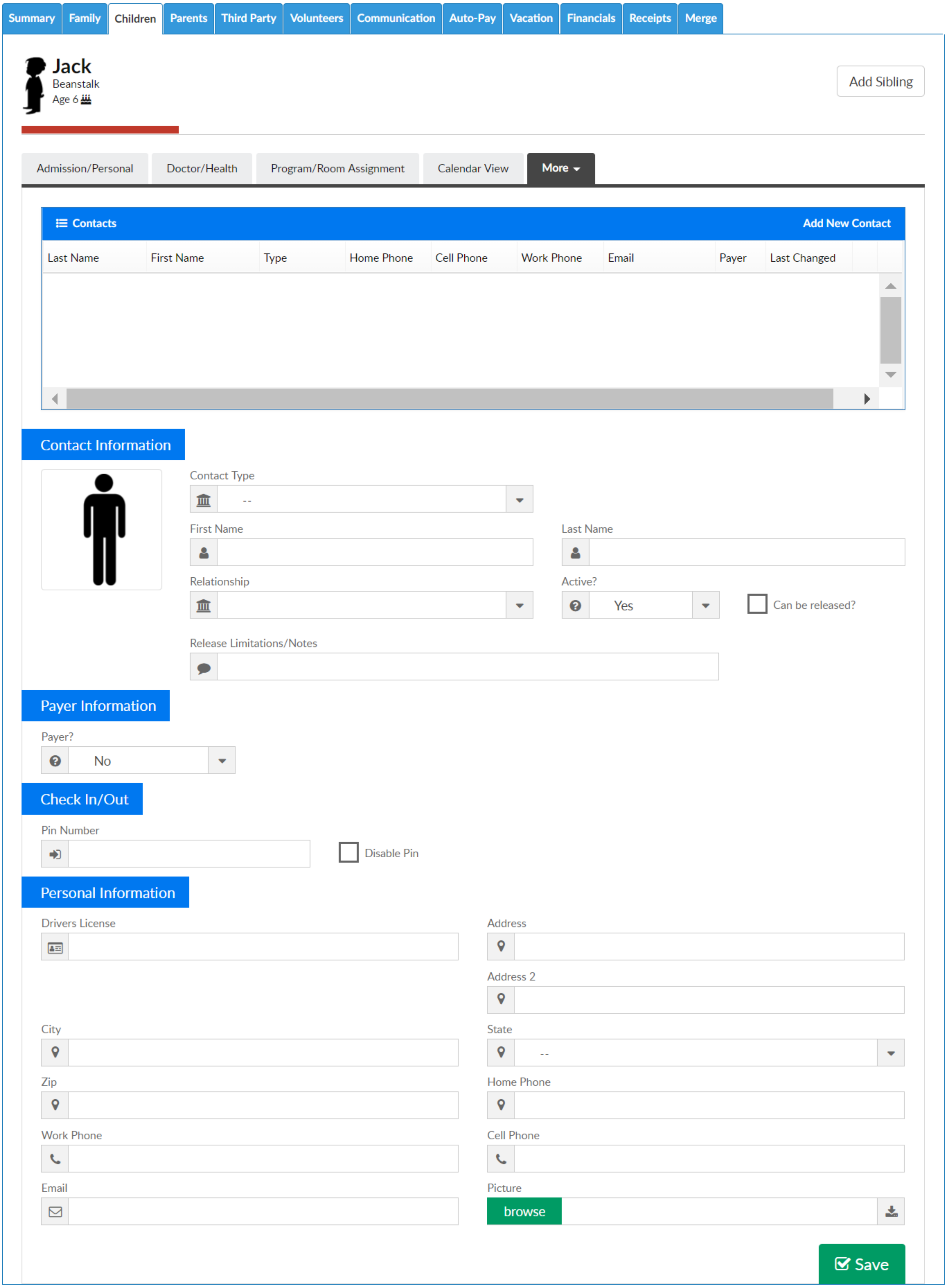
To add a new contact enter the contact's details in the blank fields then press Save. The available fields are listed below-

- Contact Type- this section helps to classify what type of contact is being entered, this is a required field (options cannot be removed from the selection list)
    - Emergency Release
    - First Release
    - Doctor
    - Dentist
    - DO NOT Release



- First Name
- Last Name
- Relationship- the values here will populate based on the Relationship type valid values that are setup under Setup > System Config, Valid Values
- Active
    - Can be Released? check this box if the contact can pick up the child
- Release Limitations/Notes
- Payer- if the contact can pay on the account or not, if this is marked as yes, then a username and password will display once the contact is saved. If yes is selected an email is required.
    - Yes

    - No
- PIN Number- the contact's PIN number will display once the contact is saved
    - Disable PIN
- Drivers License
- Address
- Address 2
- City
- State
- Zip
- Home Phone
- Work Phone
- Cell Phone
- Email
- Picture



Jack
Beanstalk
Age 6

Last Name	First Name	Type	Home Phone	Cell Phone	Work Phone	Email	Payer	Last Changed

Contact Information

Contact Type: --
First Name:
Last Name:
Relationship:
Active?: Yes
☐ Can be released?
Release Limitations/Notes:

Payer Information

Payer?: No

Check In/Out

Pin Number:
☐ Disable Pin

Personal Information

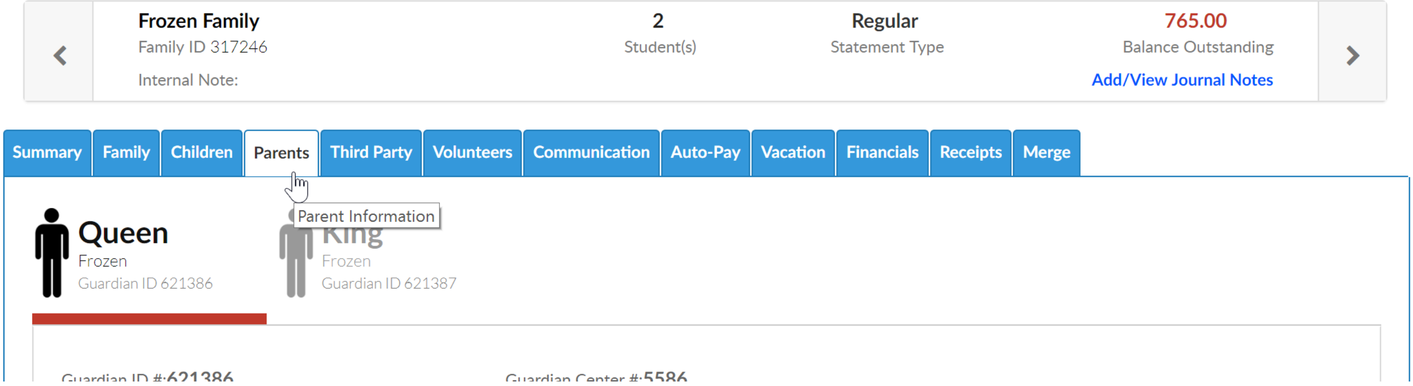
Drivers License:
Address:
Address 2:
City:
State: --
Zip:
Home Phone:
Work Phone:
Cell Phone:
Email:
Picture:

Family- What if a family opts out of receiving emails?

Last Modified on 05/23/2018 8:09 am EDT

If a family opts out of receiving emails, they will no longer receive emails sent from the Connect > Communications tab. They will still receive statement emails sent from the Payments > Outstanding screen.

To see if a family has opted out of emails from the admin side of the site, go to the family record, then click on the parent tab.



Frozen Family
Family ID 317246
Internal Note:

2
Student(s)

Regular
Statement Type

765.00
Balance Outstanding

Add/View Journal Notes

Queen
Frozen
Guardian ID 621386

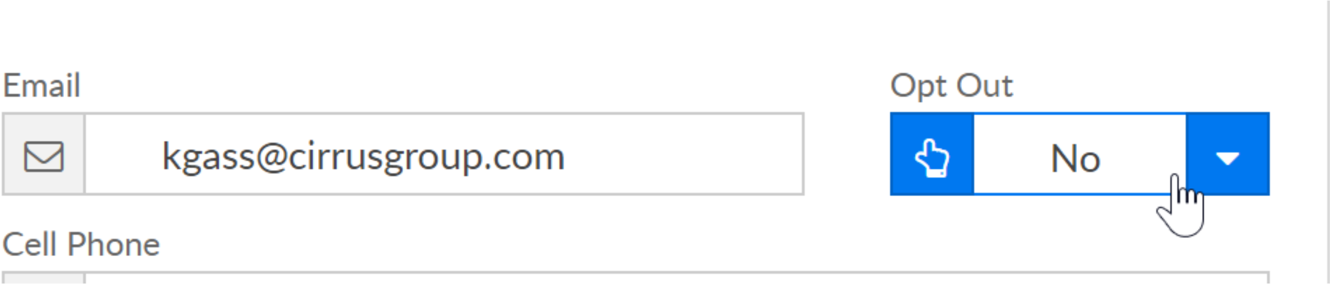
King
Frozen
Guardian ID 621387

Guardian ID #:621386
Guardian Center #:5586

Scroll to the email section and you will see the Email Opt Out screen.

Note: This should not be updated unless the parent has requested the change. (There could be legal implications- in the USA /in Canada .)

- No = the parent will still receive emails
- Yes= the parent will no longer receive emails



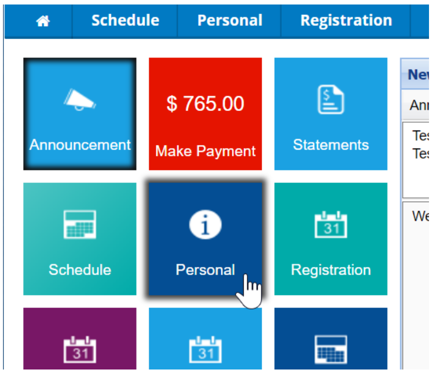
Email
kgass@cirrusgroup.com

Opt Out
No

Cell Phone

From the Parent Portal-

A parent can opt back into emails by going to the personal tab of the family portal.



Then they would click the update information link under the parent's name


Set Guardian 2 to N/A

Parents/Guardians

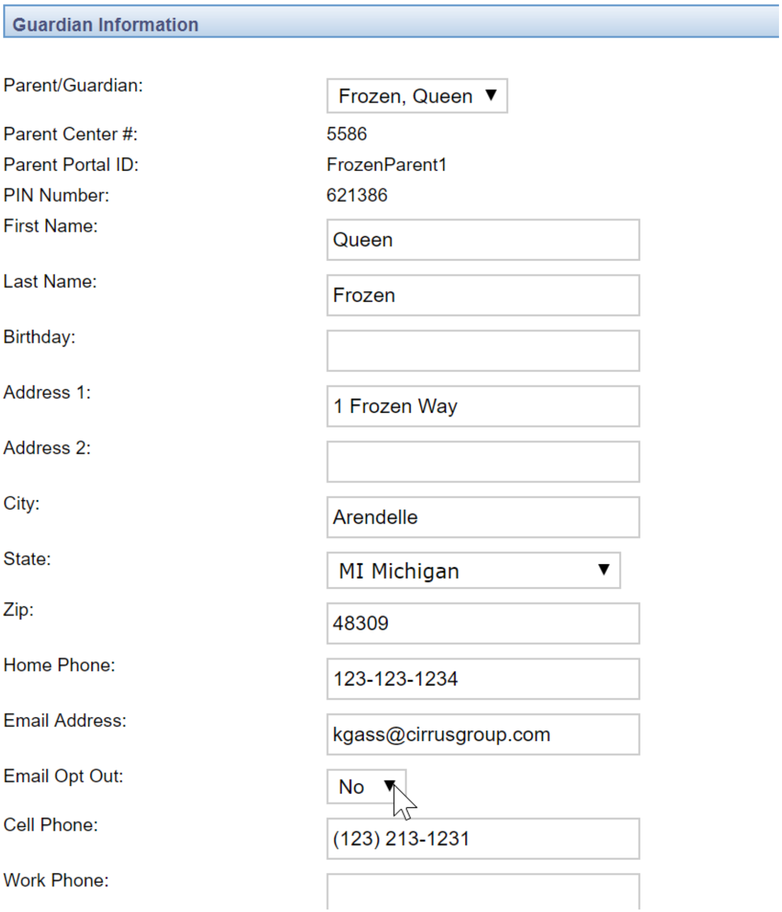
Queen Frozen
(Update Information)
Pin Number: 62[illegible]6
H: 123-123-1234
C: (123) 213-1231
Email: kgass@cirrusgroup.com

Guardian 1

King Frozen
(Update Information)
Pin Number: 621387
H: 123-123-1234
C: (123) 123-1231
Email: KingFrozen@cirrusgroup.com

Guardian 2

The guardian would change the Email Opt Out to no, then save.



Guardian Information

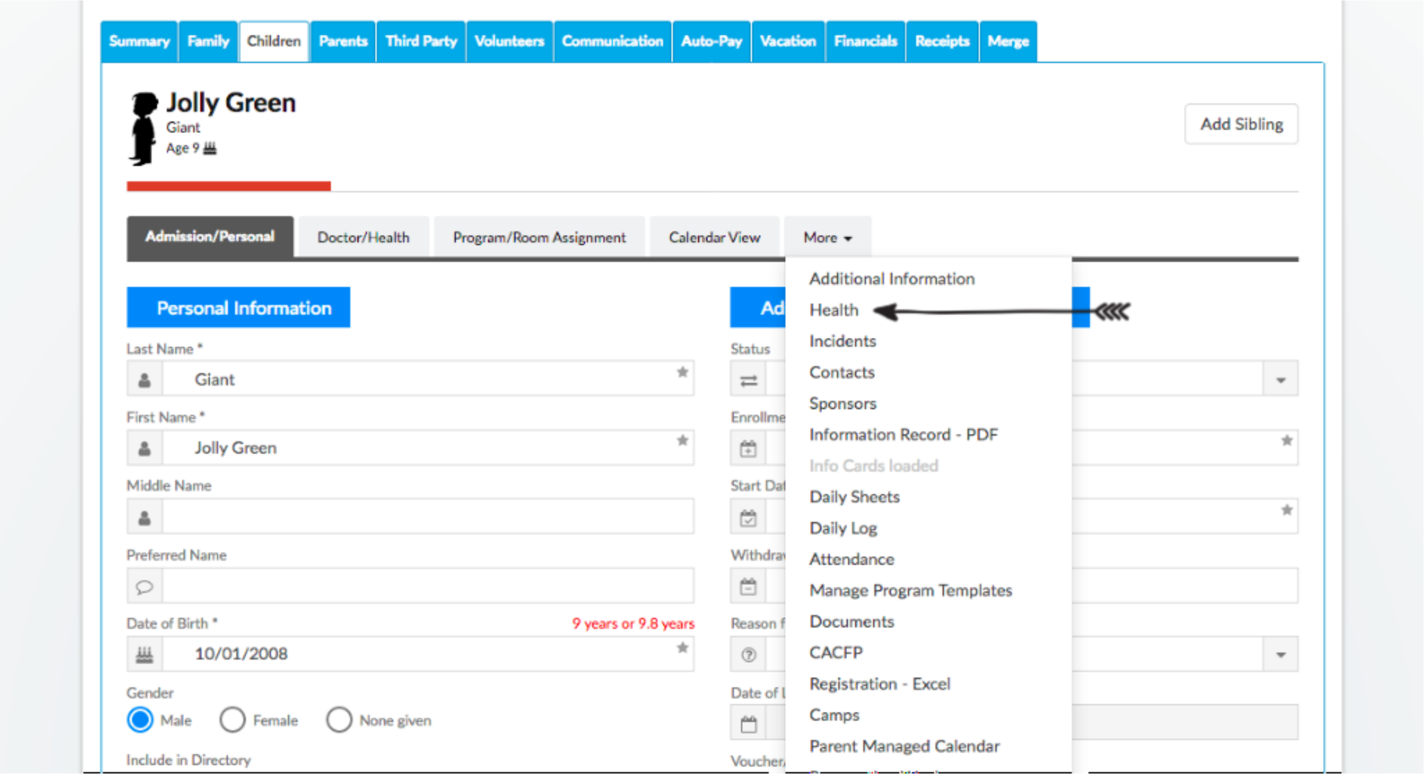
Parent/Guardian:	Frozen, Queen ▼
Parent Center #:	5586
Parent Portal ID:	FrozenParent1
PIN Number:	621386
First Name:	Queen
Last Name:	Frozen
Birthday:	
Address 1:	1 Frozen Way
Address 2:	
City:	Arendelle
State:	MI Michigan ▼
Zip:	48309
Home Phone:	123-123-1234
Email Address:	kgass@cirrusgroup.com
Email Opt Out:	No ▼
Cell Phone:	(123) 213-1231
Work Phone:	

Family- How are immunization details for children recorded (from the admin side)?

Last Modified on 06/27/2018 1:55 pm EDT

Go to the family record in the system by searching for the family.

On the family record, go to the Children tab. On the children tab, select the More option, then select Health.



Last Name * Giant

First Name * Jolly Green

Middle Name

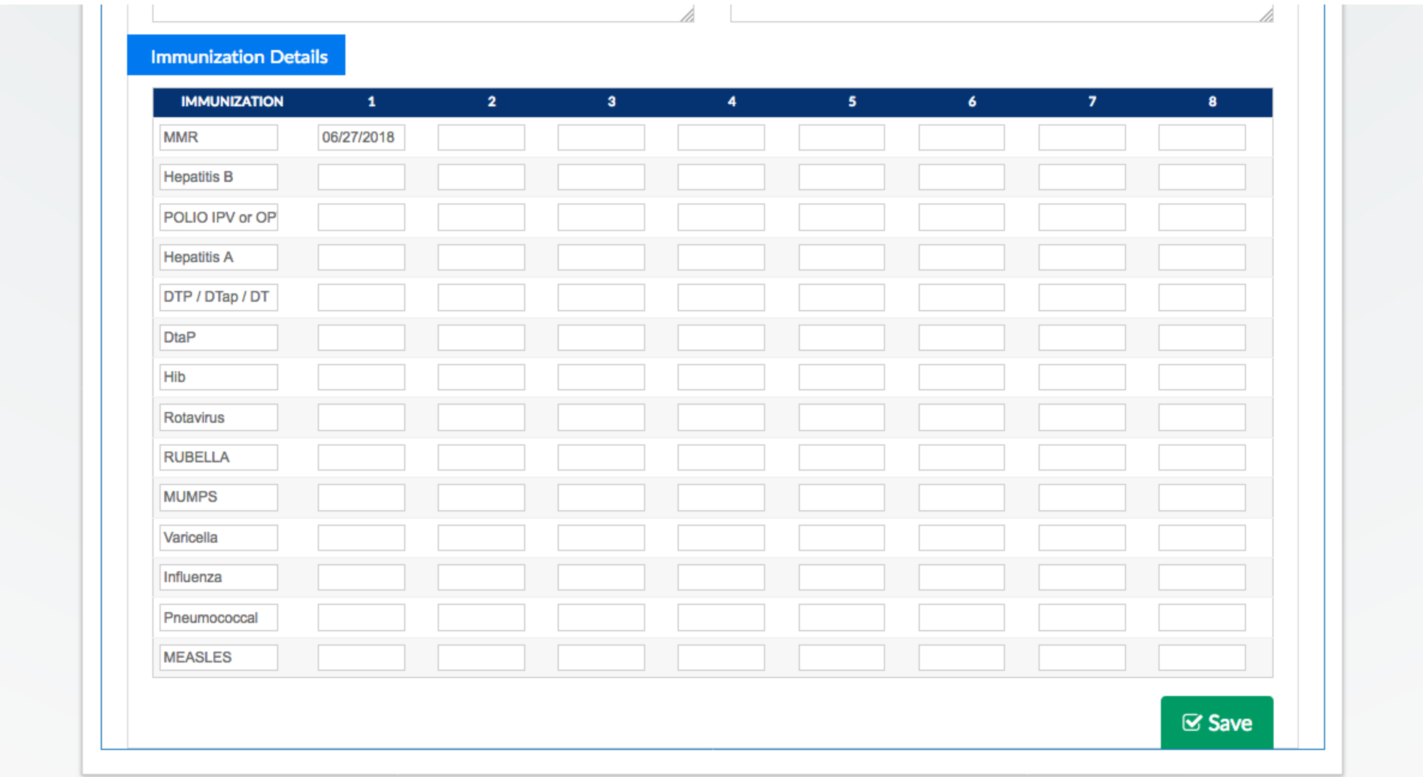
Preferred Name

Date of Birth * 10/01/2008 9 years or 9.8 years

Gender ● Male ○ Female ○ None given

Include in Directory

On the health screen, scroll to the very bottom of the screen and enter the date of the child's immunizations. Press the Save button when complete.



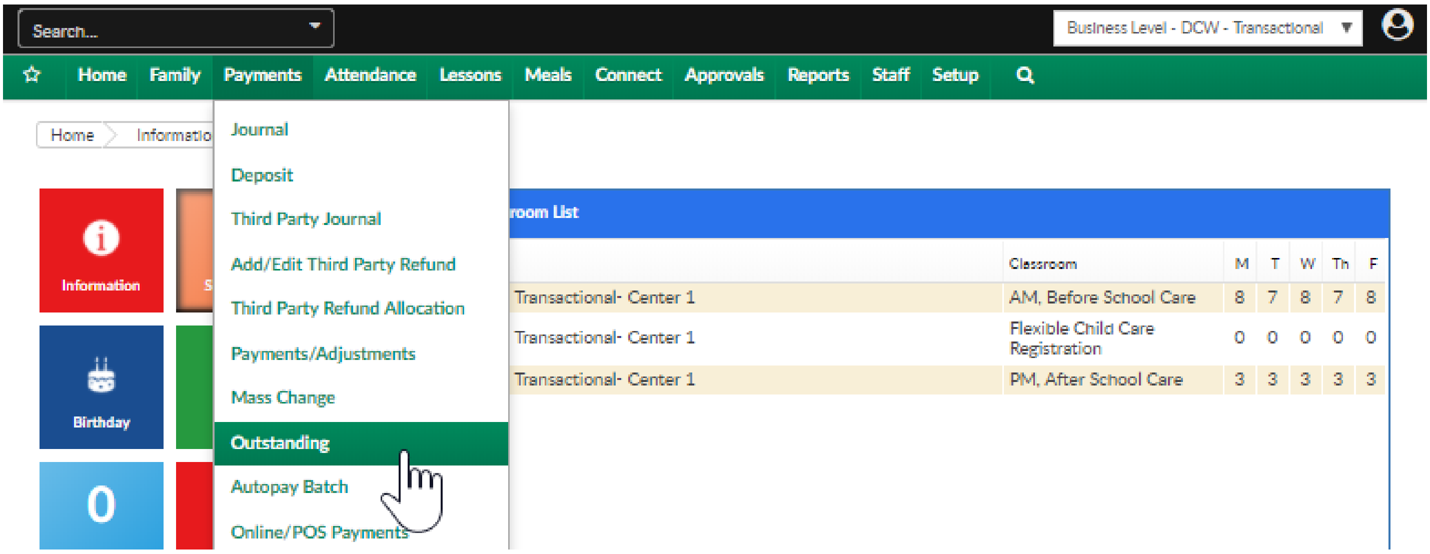
Immunization Details

IMMUNIZATION	1	2	3	4	5	6	7	8
MMR	06/27/2018							
Hepatitis B								
POLIO IPV or OP								
Hepatitis A								
DTP / DTap / DT								
DtaP								
Hib								
Rotavirus								
RUBELLA								
MUMPS								
Varicella								
Influenza								
Pneumococcal								
MEASLES								

Financials- How do I send invoices?

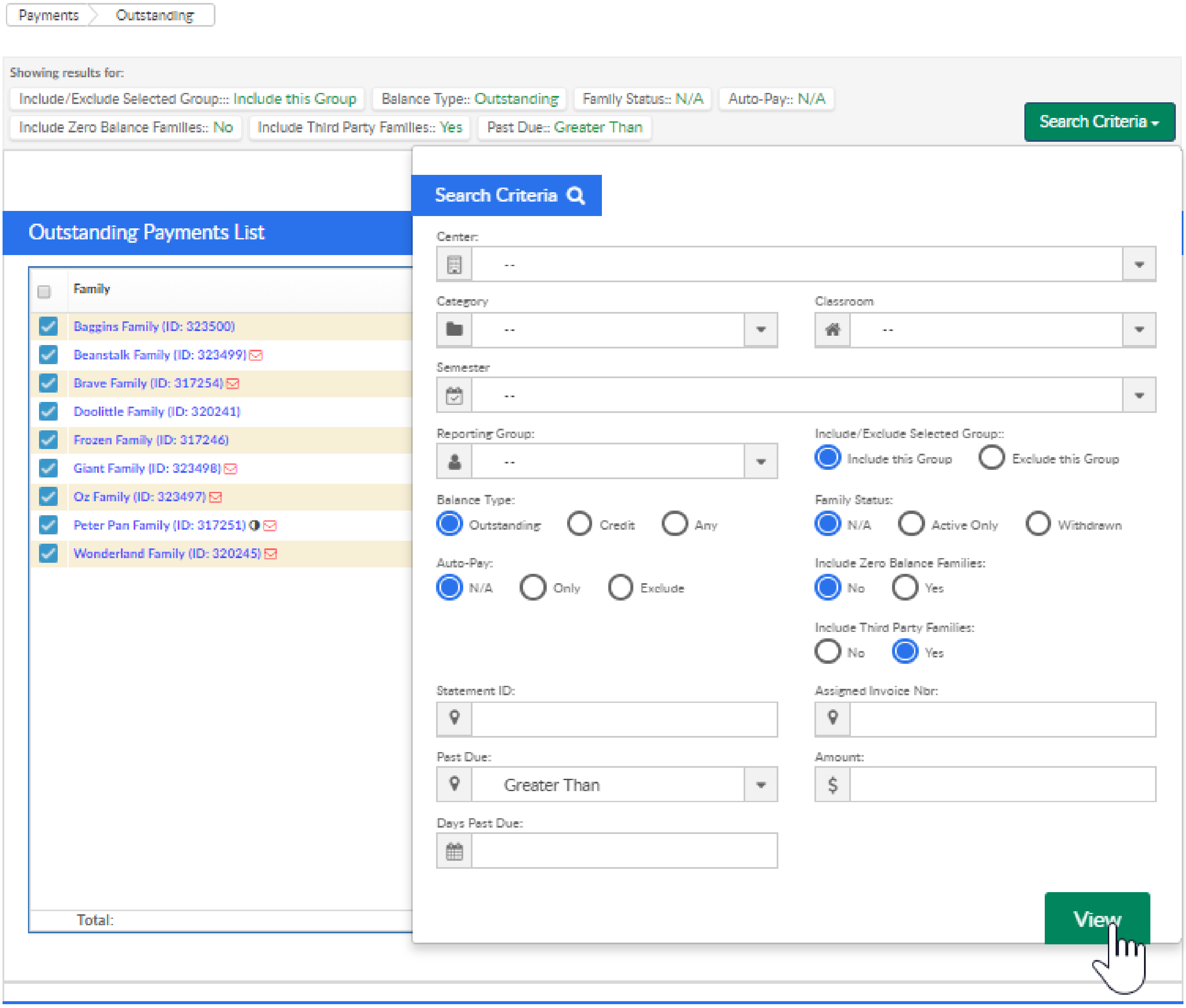
Last Modified on 06/28/2018 2:42 pm EDT

To send invoices, select the Payments menu, then select the Outstanding option.



	Classroom	M	T	W	Th	F
Transactional- Center 1	AM, Before School Care	8	7	8	7	8
Transactional- Center 1	Flexible Child Care Registration	0	0	0	0	0
Transactional- Center 1	PM, After School Care	3	3	3	3	3

Once on the Outstanding page, select the search criteria button to display the families that match your criteria. Once criteria has been entered, select the view option.

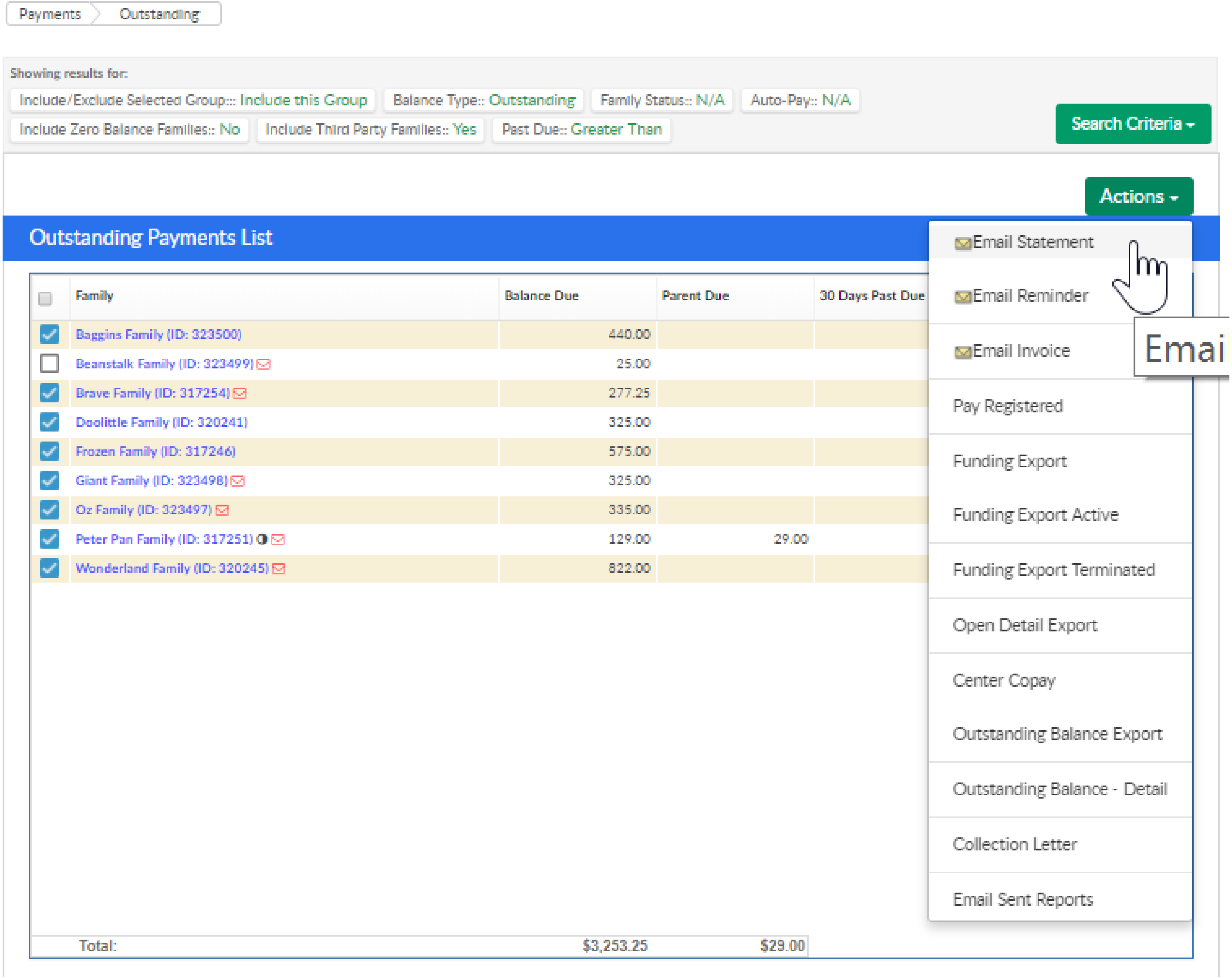


Showing results for:
Include/Exclude Selected Group::: Include this Group | Balance Type:: Outstanding | Family Status:: N/A | Auto-Pay:: N/A
Include Zero Balance Families:: No | Include Third Party Families:: Yes | Past Due:: Greater Than

☐	Family
☑	Baggins Family (ID: 323500)
☑	Beanstalk Family (ID: 323499) ✉
☑	Brave Family (ID: 317254) ✉
☑	Doolittle Family (ID: 320241)
☑	Frozen Family (ID: 317246)
☑	Giant Family (ID: 323498) ✉
☑	Oz Family (ID: 323497) ✉
☑	Peter Pan Family (ID: 317251) ◑ ✉
☑	Wonderland Family (ID: 320245) ✉
	Total:

Center: --
Category: --
Classroom: --
Semester: --
Reporting Group: --
Include/Exclude Selected Group:: ● Include this Group ○ Exclude this Group
Balance Type: ● Outstanding ○ Credit ○ Any
Family Status: ● N/A ○ Active Only ○ Withdrawn
Auto-Pay: ● N/A ○ Only ○ Exclude
Include Zero Balance Families: ● No ○ Yes
Include Third Party Families: ○ No ● Yes
Statement ID:
Assigned Invoice Nbr:
Past Due: Greater Than
Amount: $
Days Past Due:

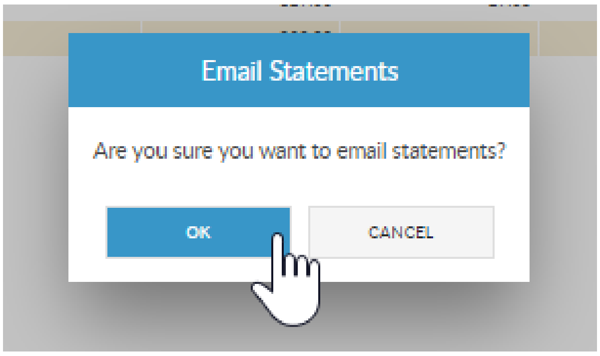
Any family that has a check mark next to their name will be included when you send invoices. Uncheck any families that should not receive the emailed invoice. Then select the actions menu, select the Email Statement option.



Showing results for:
Include/Exclude Selected Group:: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

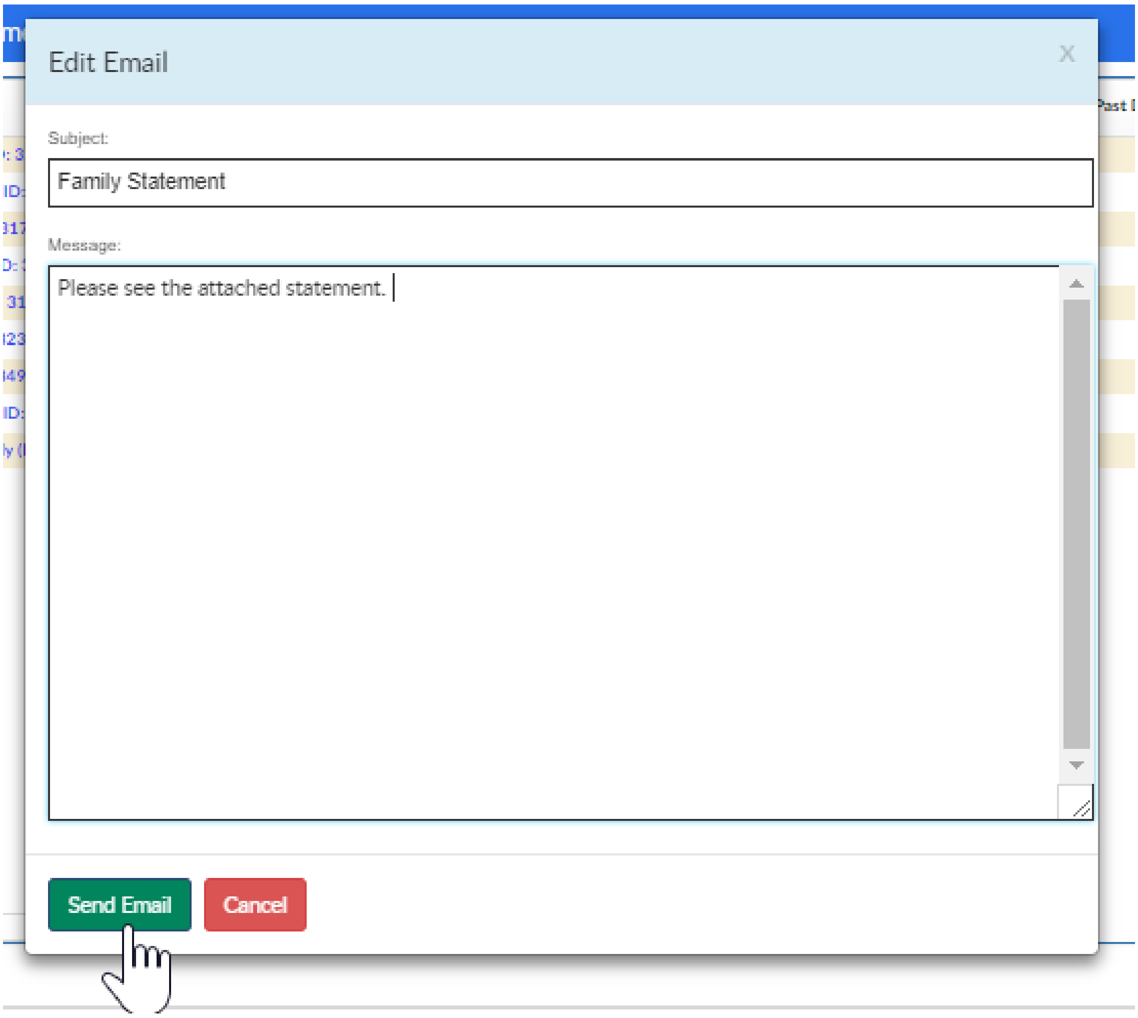
☐	Family	Balance Due	Parent Due	30 Days Past Due
☑	Baggins Family (ID: 323500)	440.00		
☐	Beanstalk Family (ID: 323499) ✉	25.00		
☑	Brave Family (ID: 317254) ✉	277.25		
☑	Doolittle Family (ID: 320241)	325.00		
☑	Frozen Family (ID: 317246)	575.00		
☑	Giant Family (ID: 323498) ✉	325.00		
☑	Oz Family (ID: 323497) ✉	335.00		
☑	Peter Pan Family (ID: 317251) ◑ ✉	129.00	29.00	
☑	Wonderland Family (ID: 320245) ✉	822.00		
	Total:	$3,253.25	$29.00	

Press OK when the confirmation box appears.



Are you sure you want to email statements?

Edit text as needed, then press Send Email.



Subject:
Family Statement

Message:
Please see the attached statement.

Confirmation will display when the email process has been completed.

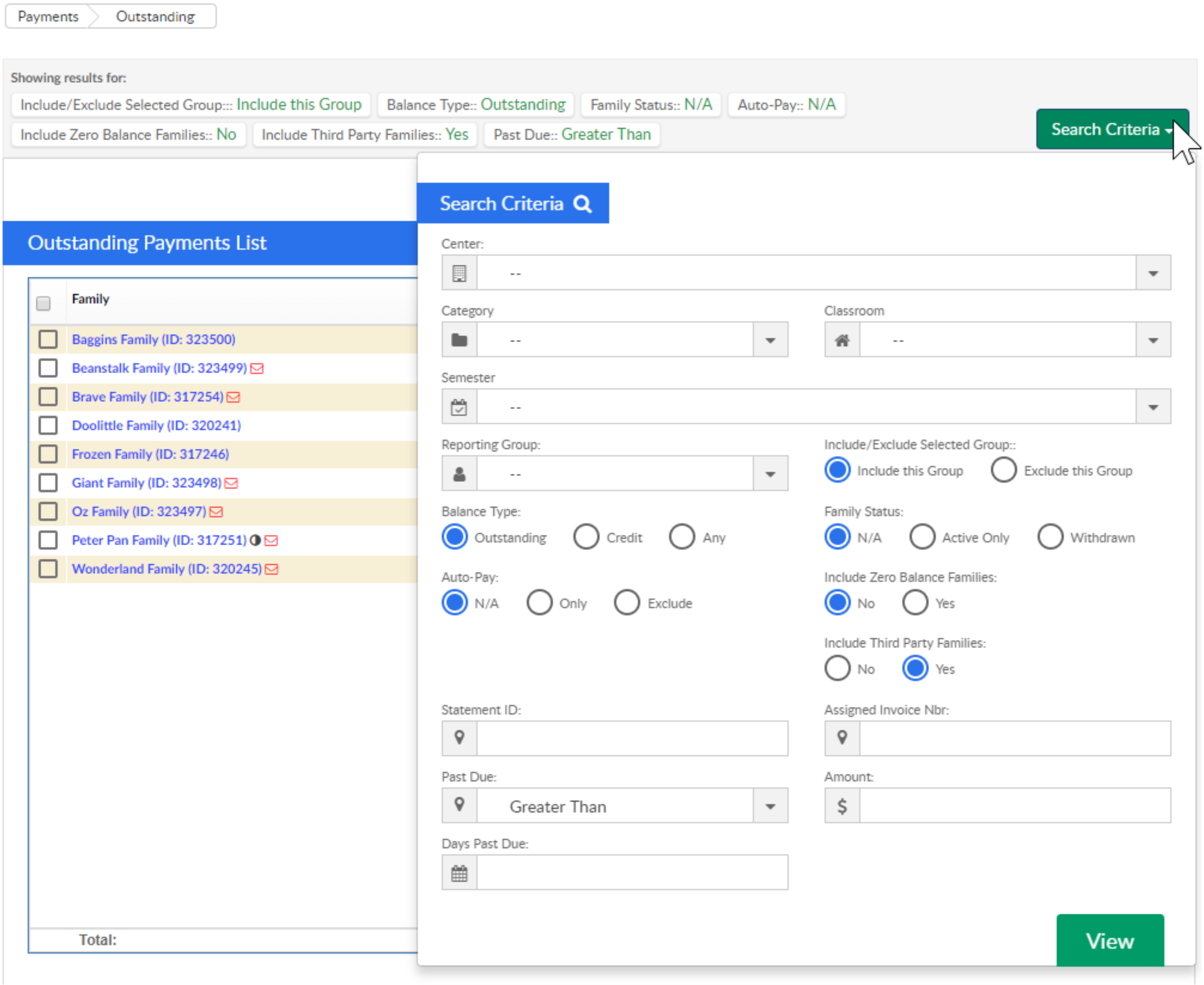
Financial- How do I add a late fee to multiple family accounts?

Last Modified on 06/28/2018 2:44 pm EDT

There are several ways a credit (adjustment) or a fee could be added to a family account.

To add a late credit or fee to a group of family accounts go to thePayments menu, then select Outstanding.

On the Outstanding screen, use the Search Criteria option to edit the families that display in the outstanding payments list.



Showing results for:
Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

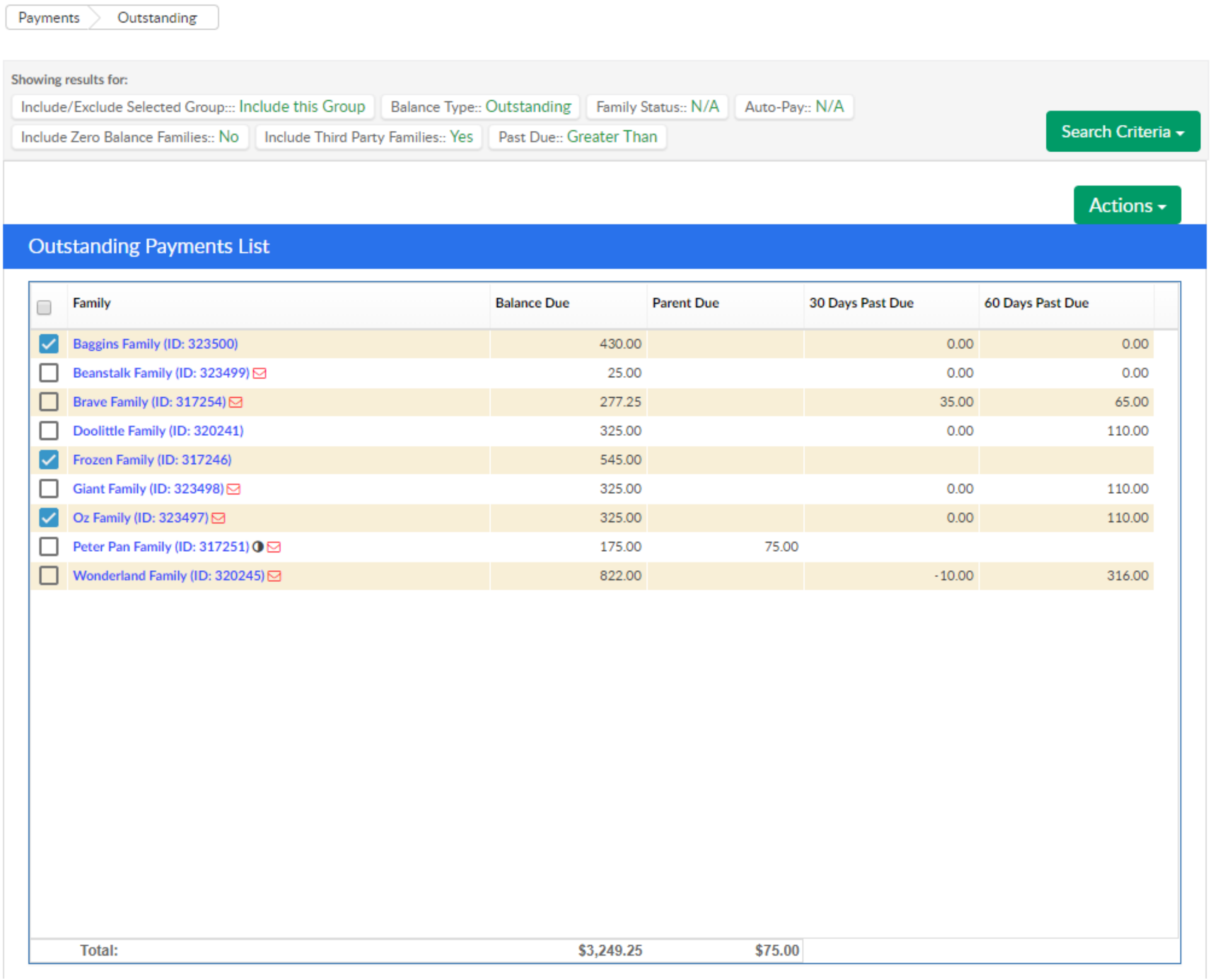
☐	Family
☐	Baggins Family (ID: 323500)
☐	Beanstalk Family (ID: 323499) ✉
☐	Brave Family (ID: 317254) ✉
☐	Doolittle Family (ID: 320241)
☐	Frozen Family (ID: 317246)
☐	Giant Family (ID: 323498) ✉
☐	Oz Family (ID: 323497) ✉
☐	Peter Pan Family (ID: 317251) ◑ ✉
☐	Wonderland Family (ID: 320245) ✉
	Total:

Center: --
Category: --
Classroom: --
Semester: --
Reporting Group: --
Include/Exclude Selected Group:: ● Include this Group ○ Exclude this Group
Balance Type: ● Outstanding ○ Credit ○ Any
Family Status: ● N/A ○ Active Only ○ Withdrawn
Auto-Pay: ● N/A ○ Only ○ Exclude
Include Zero Balance Families: ● No ○ Yes
Include Third Party Families: ○ No ● Yes
Statement ID:
Assigned Invoice Nbr:
Past Due: Greater Than
Amount: $
Days Past Due:

Once families display check or uncheck the box next to. each family's name.

- If the box is checked the family will be impacted by whatever action is selected next.

- If the box is not checked the family will not be impacted.



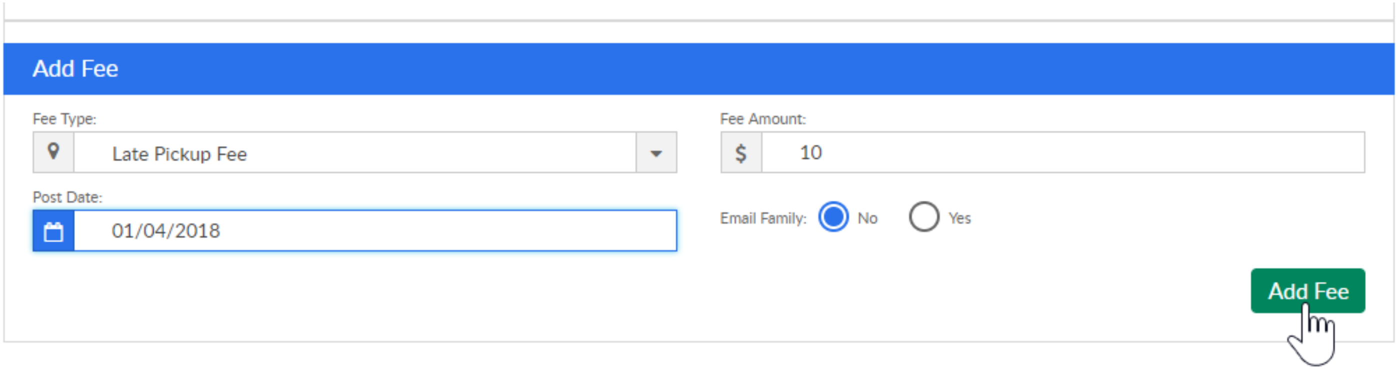
Showing results for:

Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

Outstanding Payments List

☐	Family	Balance Due	Parent Due	30 Days Past Due	60 Days Past Due
☑	Baggins Family (ID: 323500)	430.00		0.00	0.00
☐	Beanstalk Family (ID: 323499) ✉	25.00		0.00	0.00
☐	Brave Family (ID: 317254) ✉	277.25		35.00	65.00
☐	Doolittle Family (ID: 320241)	325.00		0.00	110.00
☑	Frozen Family (ID: 317246)	545.00			
☐	Giant Family (ID: 323498) ✉	325.00		0.00	110.00
☑	Oz Family (ID: 323497) ✉	325.00		0.00	110.00
☐	Peter Pan Family (ID: 317251) ◑ ✉	175.00	75.00		
☐	Wonderland Family (ID: 320245) ✉	822.00		-10.00	316.00
	Total:	$3,249.25	$75.00		

Scroll down to the Add Fee section and select the type of fee, fee amount and post date. If an email should be sent to the selected families alerting that a fee has been added select the Yes radio button on the Email Family option- if an email should not be sent select No. Then select Add Fee.



Add Fee

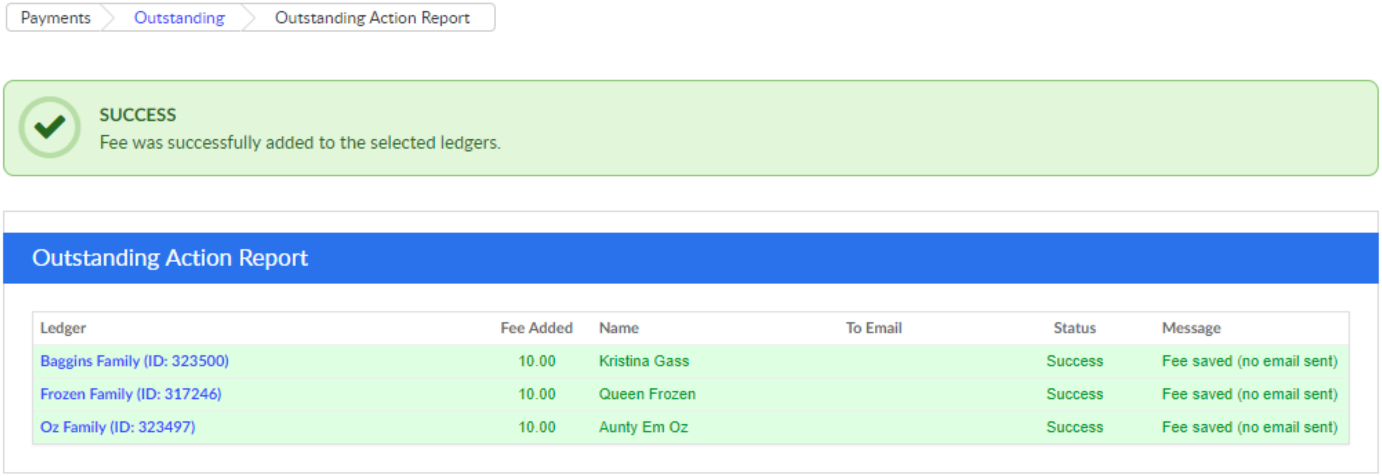
Fee Type: Late Pickup Fee

Fee Amount: $ 10

Post Date: 01/04/2018

Email Family: ● No ○ Yes

When the fee has been added to the ledgers a confirmation screen will appear and will display the family, fee amount, sponsor name, email address, status and message for each ledger that has been impacted.



SUCCESS
Fee was successfully added to the selected ledgers.

Outstanding Action Report

Ledger	Fee Added	Name	To Email	Status	Message
Baggins Family (ID: 323500)	10.00	Kristina Gass		Success	Fee saved (no email sent)
Frozen Family (ID: 317246)	10.00	Queen Frozen		Success	Fee saved (no email sent)
Oz Family (ID: 323497)	10.00	Aunty Em Oz		Success	Fee saved (no email sent)

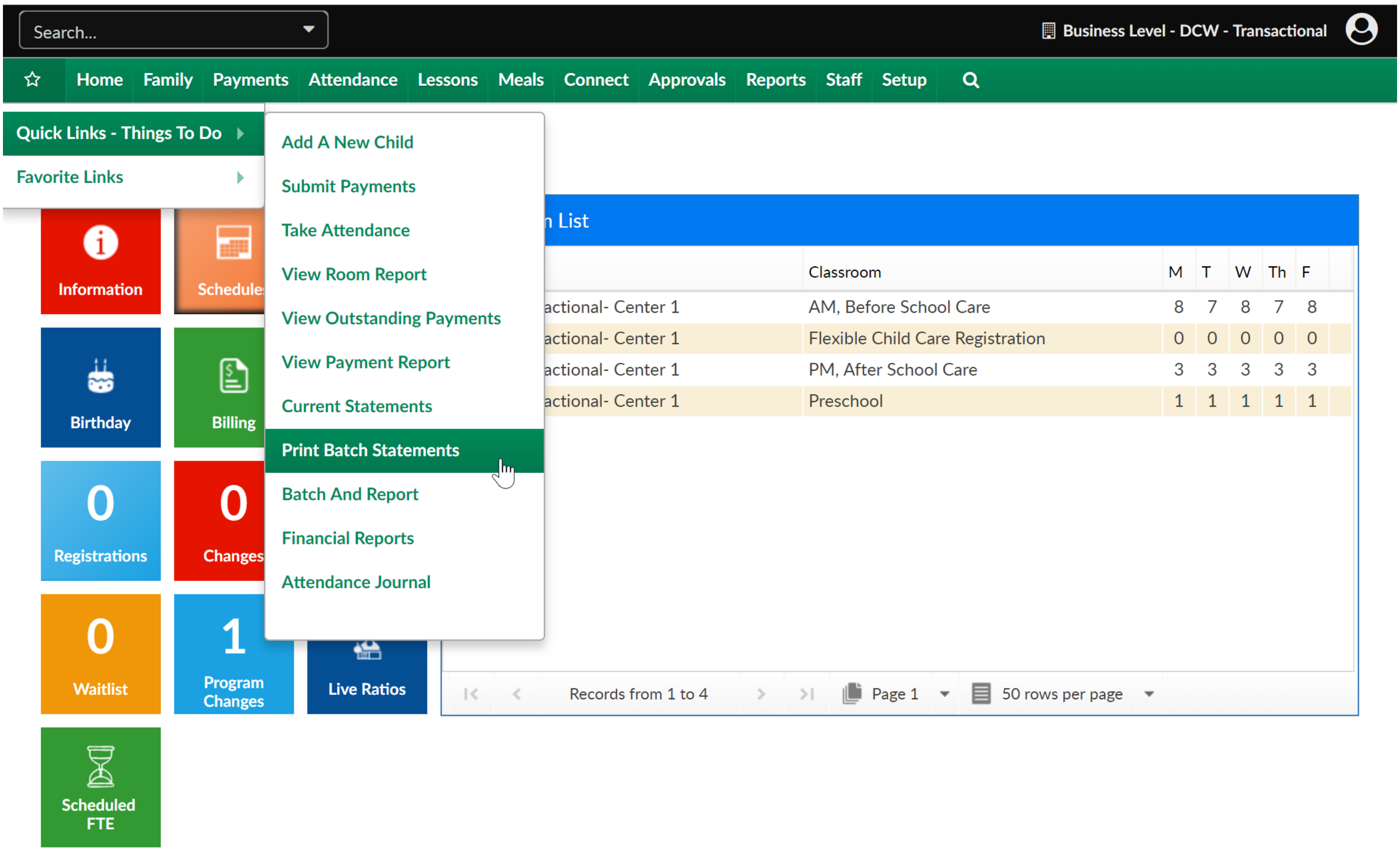
If a family is split the fee will typically be added to parent/guardian 1's ledger.

Financial- How do I create a PDF copy of statements for families?

Last Modified on 06/28/2018 2:45 pm EDT

The Print Batch Statements option creates a PDF for a time period of all family statements.

From the home toolbar select the star icon, hover over Quick Links- Things To Do, then select Print Batch Statements-

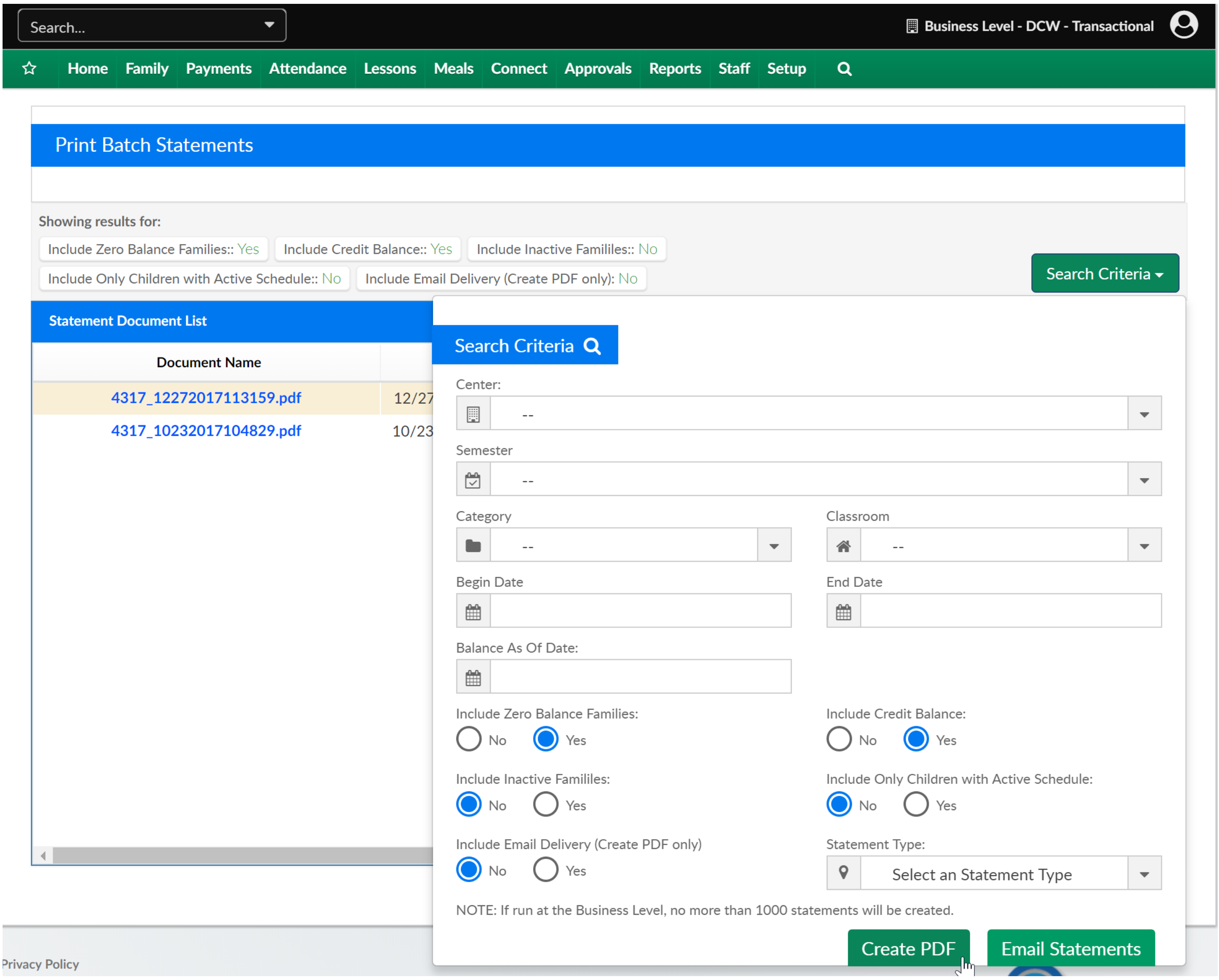


	Classroom	M	T	W	Th	F
actional- Center 1	AM, Before School Care	8	7	8	7	8
actional- Center 1	Flexible Child Care Registration	0	0	0	0	0
actional- Center 1	PM, After School Care	3	3	3	3	3
actional- Center 1	Preschool	1	1	1	1	1

On the Print Batch Statements screen select the Search Criteria button and add detail to search by-

- Center
- Semester
- Category
- Classroom
- Begin Date
- End Date
- Balance As Of Date

- Include Zero Balance Families
- Include Credit Balance
- Include Inactive Families
- Include Only Children with Active Schedule
- Include Email Delivery (Create PDF Only)
- Statement Type
    - Invoice Statement
    - Customer Statement



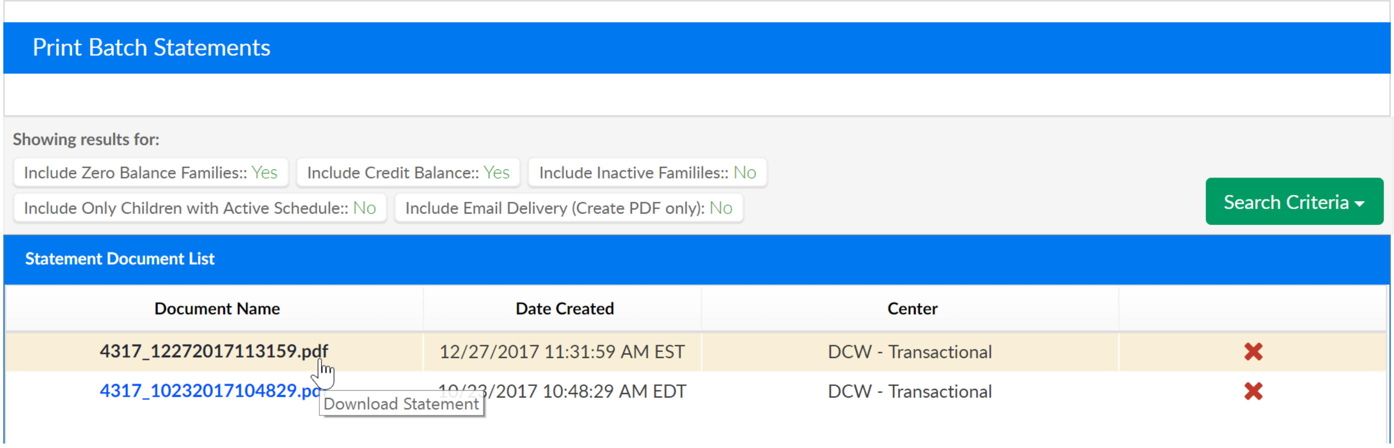
Showing results for:
Include Zero Balance Families:: Yes
Include Credit Balance:: Yes
Include Inactive Famililes:: No
Include Only Children with Active Schedule:: No
Include Email Delivery (Create PDF only): No

Document Name	
4317_12272017113159.pdf	12/27
4317_10232017104829.pdf	10/23

Center: --
Semester: --
Category: --
Classroom: --
Begin Date:
End Date:
Balance As Of Date:
Include Zero Balance Families: ○ No ● Yes
Include Credit Balance: ○ No ● Yes
Include Inactive Famililes: ● No ○ Yes
Include Only Children with Active Schedule: ● No ○ Yes
Include Email Delivery (Create PDF only) ● No ○ Yes
Statement Type: Select an Statement Type

NOTE: If run at the Business Level, no more than 1000 statements will be created.

Once the file is created, select the blue hyperlink to open the file.



Print Batch Statements

Showing results for:

Include Zero Balance Families:: Yes

Include Credit Balance:: Yes

Include Inactive Famililes:: No

Include Only Children with Active Schedule:: No

Include Email Delivery (Create PDF only): No

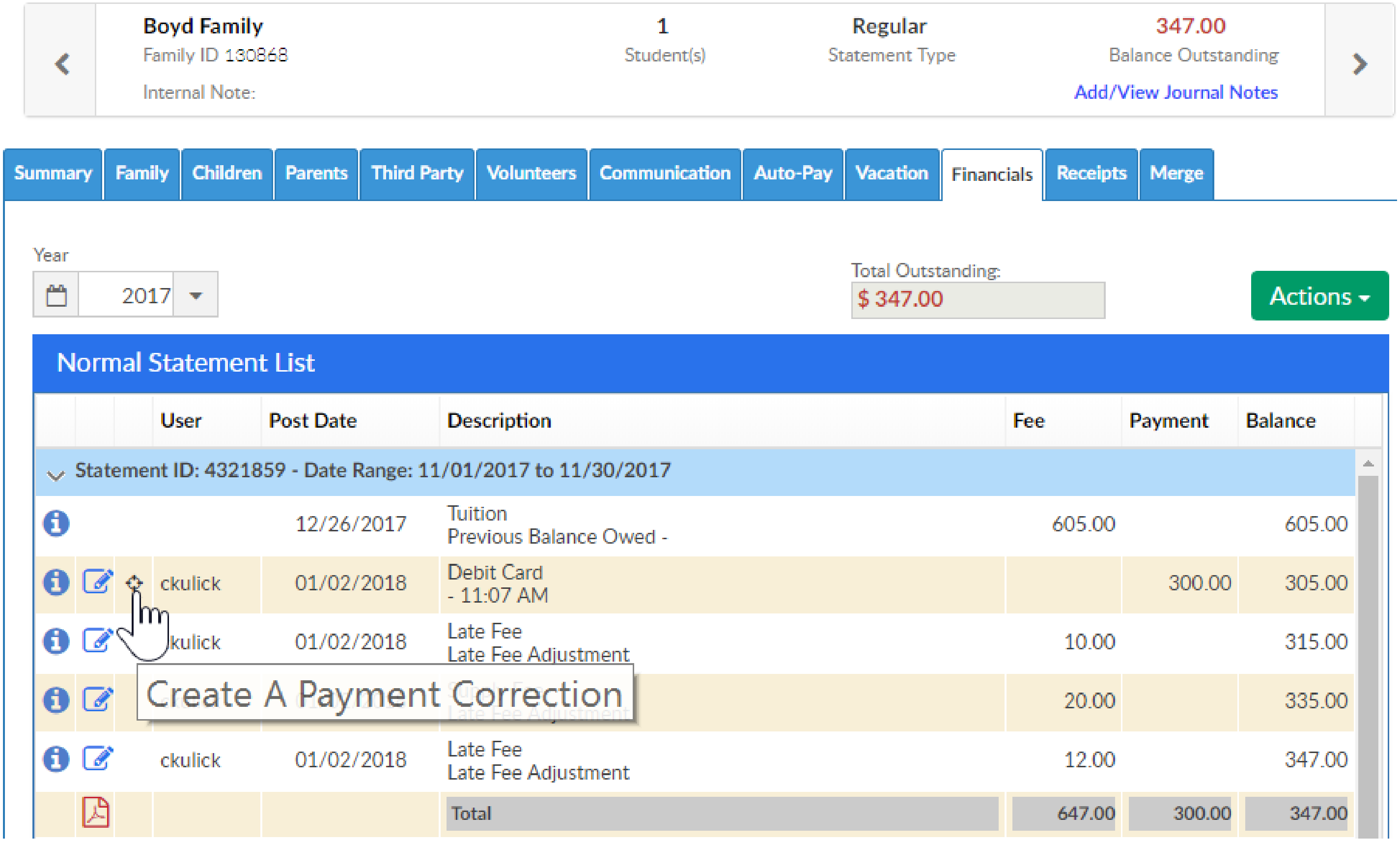
Statement Document List

Document Name	Date Created	Center	
4317_12272017113159.pdf	12/27/2017 11:31:59 AM EST	DCW - Transactional	✖
4317_10232017104829.pd	10/23/2017 10:48:29 AM EDT	DCW - Transactional	✖

Financial- How do I process a refund?

Last Modified on 05/01/2018 12:18 pm EDT

To process a refund go to the family's financial page and select the payment corrections icon.



Boyd Family
Family ID 130868
Internal Note:

1 Student(s)

Regular Statement Type

347.00 Balance Outstanding

Add/View Journal Notes

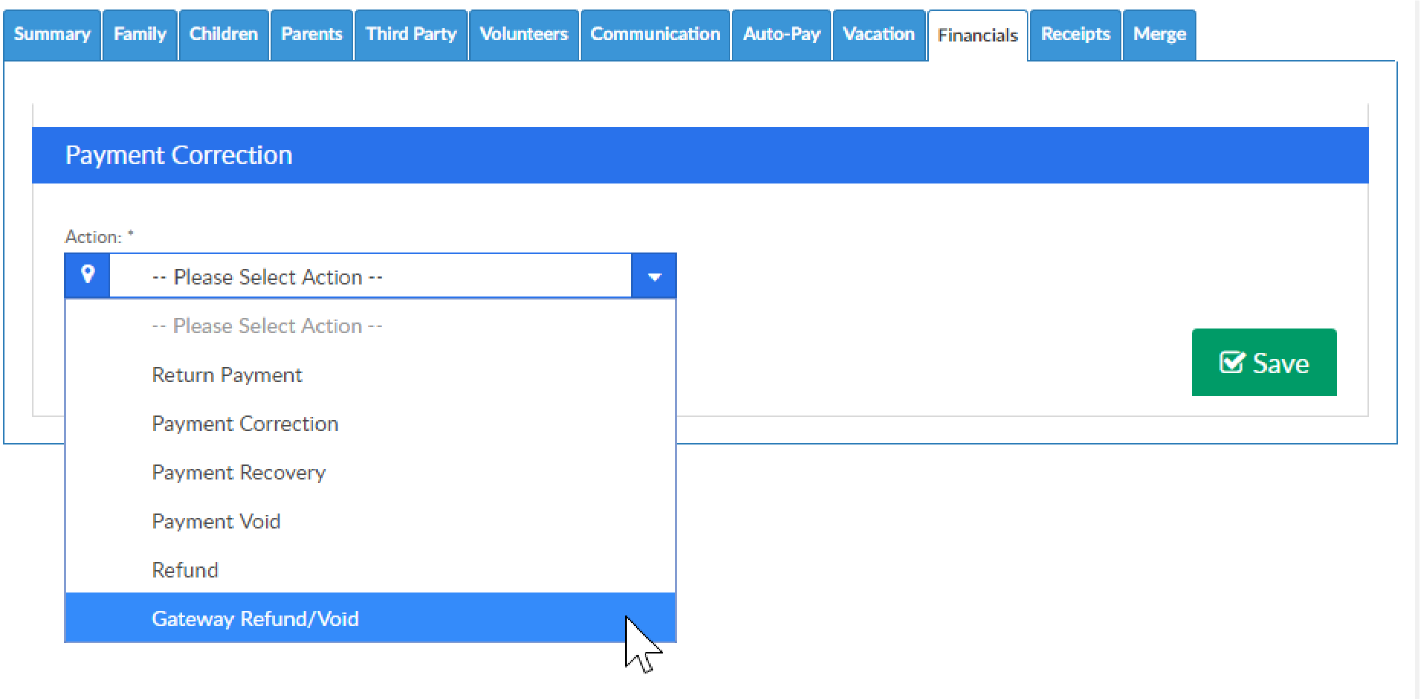
Year 2017

Total Outstanding: $ 347.00

Normal Statement List

User	Post Date	Description	Fee	Payment	Balance
Statement ID: 4321859 - Date Range: 11/01/2017 to 11/30/2017					
	12/26/2017	Tuition Previous Balance Owed -	605.00		605.00
ckulick	01/02/2018	Debit Card - 11:07 AM		300.00	305.00
ckulick	01/02/2018	Late Fee Late Fee Adjustment	10.00		315.00
		Late Fee Adjustment	20.00		335.00
ckulick	01/02/2018	Late Fee Late Fee Adjustment	12.00		347.00
		Total	647.00	300.00	347.00

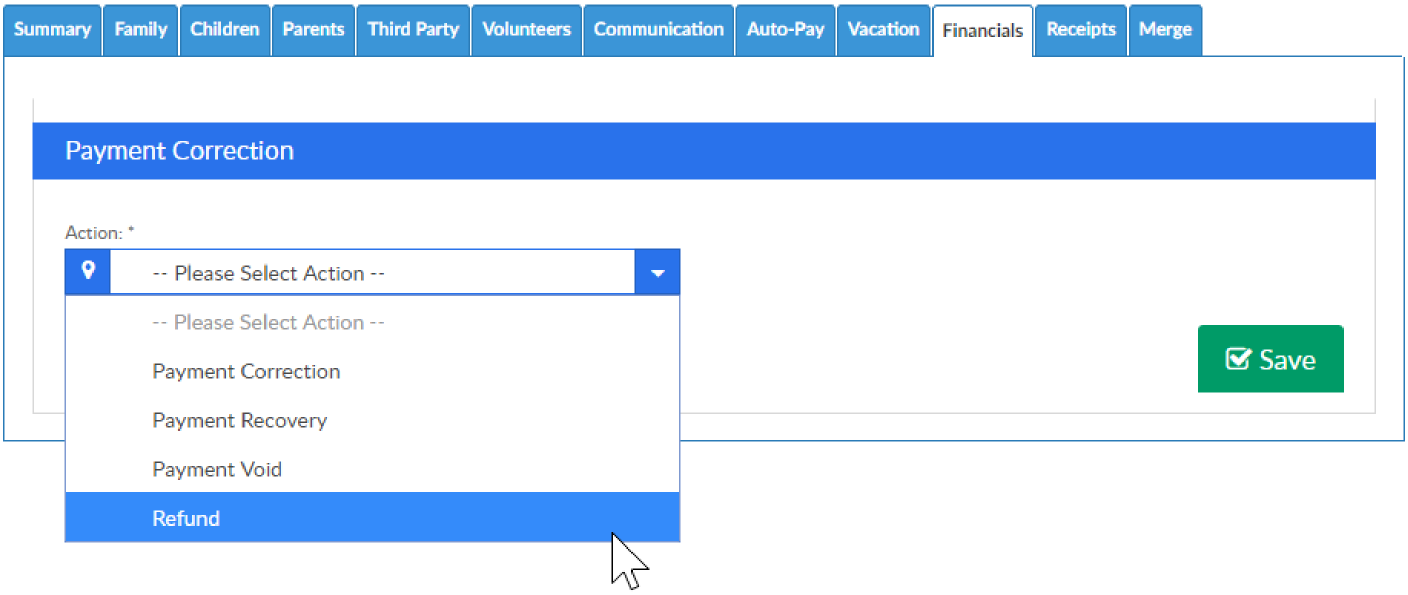
If the refund is a credit card refund select Gateway Refund/Void-



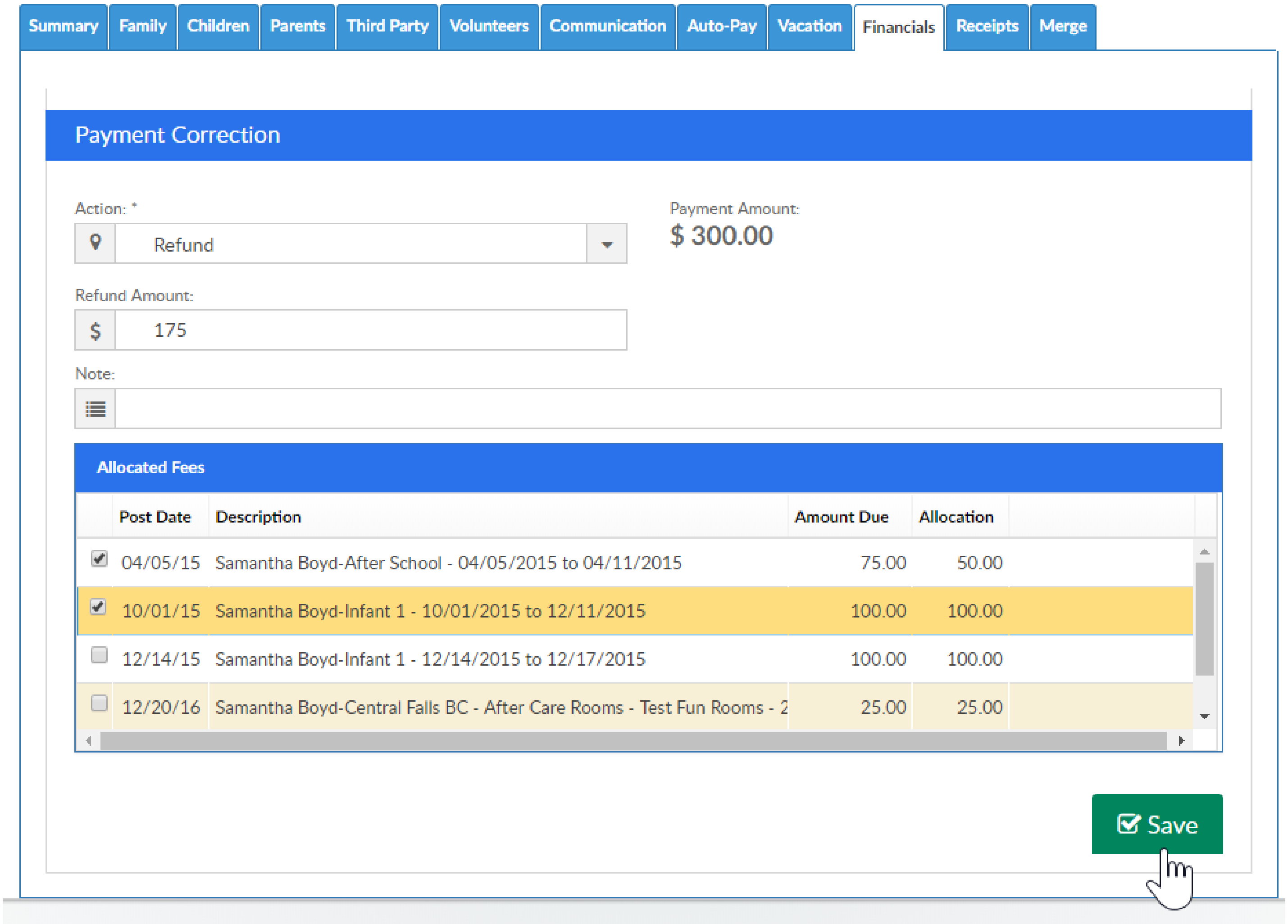
Payment Correction

Action: * -- Please Select Action --

If the refund is a check or cash refund select Refund-



Enter amount being refunded, then select Save-



Action: * Refund

Payment Amount: $ 300.00

Refund Amount: $ 175

	Post Date	Description	Amount Due	Allocation
☑	04/05/15	Samantha Boyd-After School - 04/05/2015 to 04/11/2015	75.00	50.00
☑	10/01/15	Samantha Boyd-Infant 1 - 10/01/2015 to 12/11/2015	100.00	100.00
☐	12/14/15	Samantha Boyd-Infant 1 - 12/14/2015 to 12/17/2015	100.00	100.00
☐	12/20/16	Samantha Boyd-Central Falls BC - After Care Rooms - Test Fun Rooms - 2	25.00	25.00

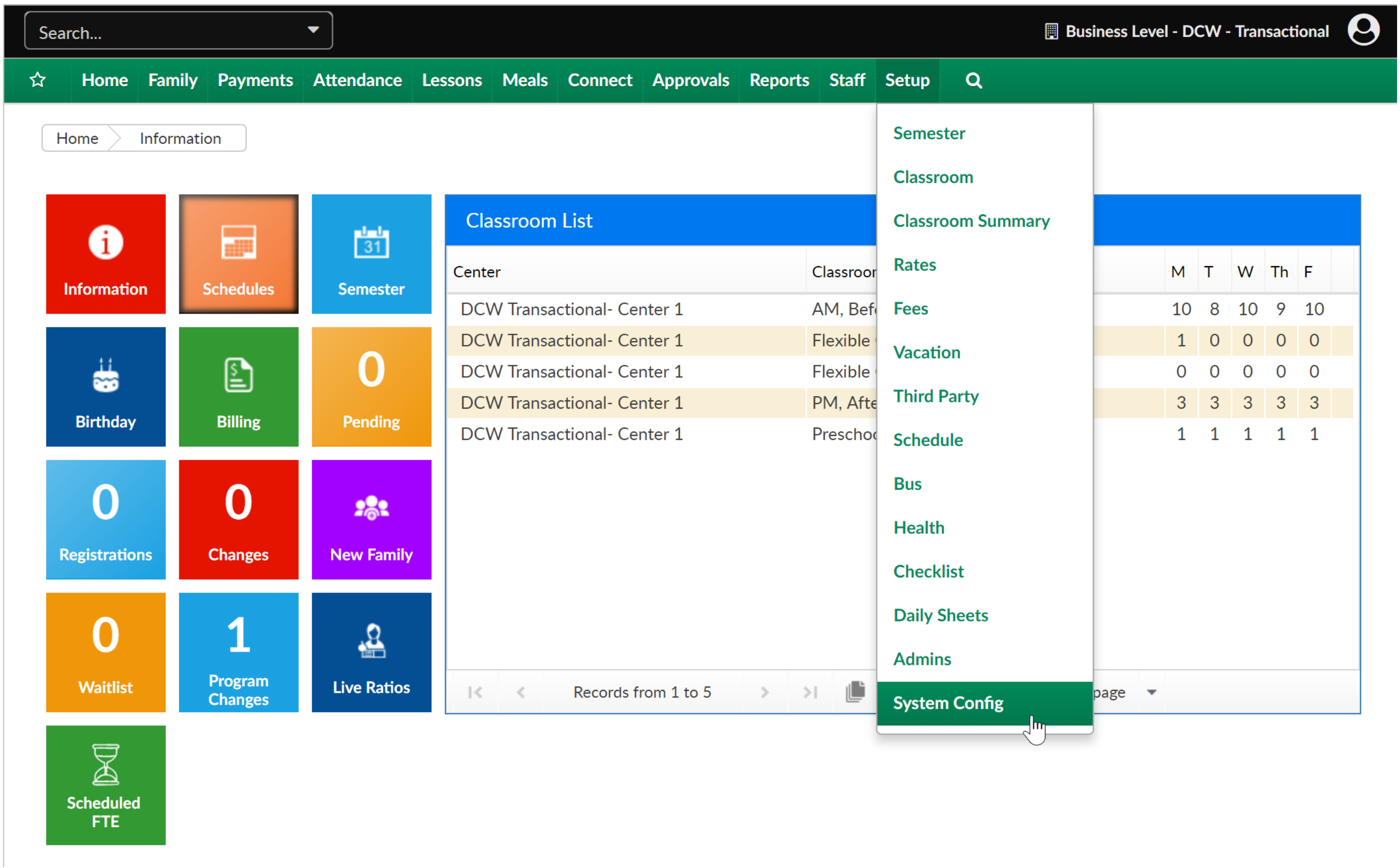
- If the payment was made by cash or check, the refund will need to be created outside of our system after the Refund option has been selected and added to the financial ledger.

- If the payment was made electronically- credit card or ACH and the Gateway Refund/Void option is selected the refund will automatically go back to the parent's credit card or ACH account.

Financial- How do we setup a convenience/service fee for electronic payments?

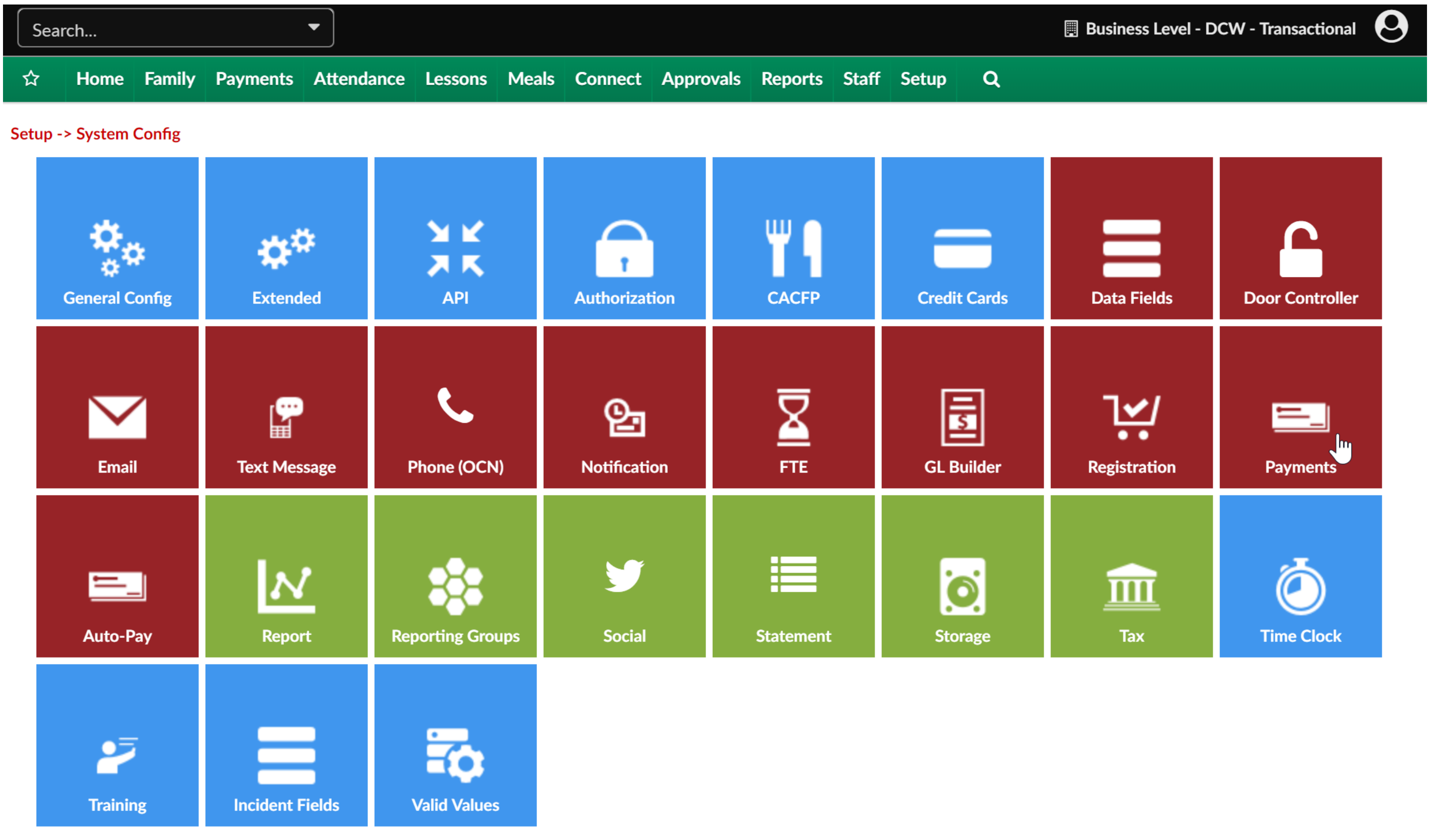
Last Modified on 06/28/2018 2:46 pm EDT

To add a convenience/service fee for electronic payments go to the Setup menu, then select system config-

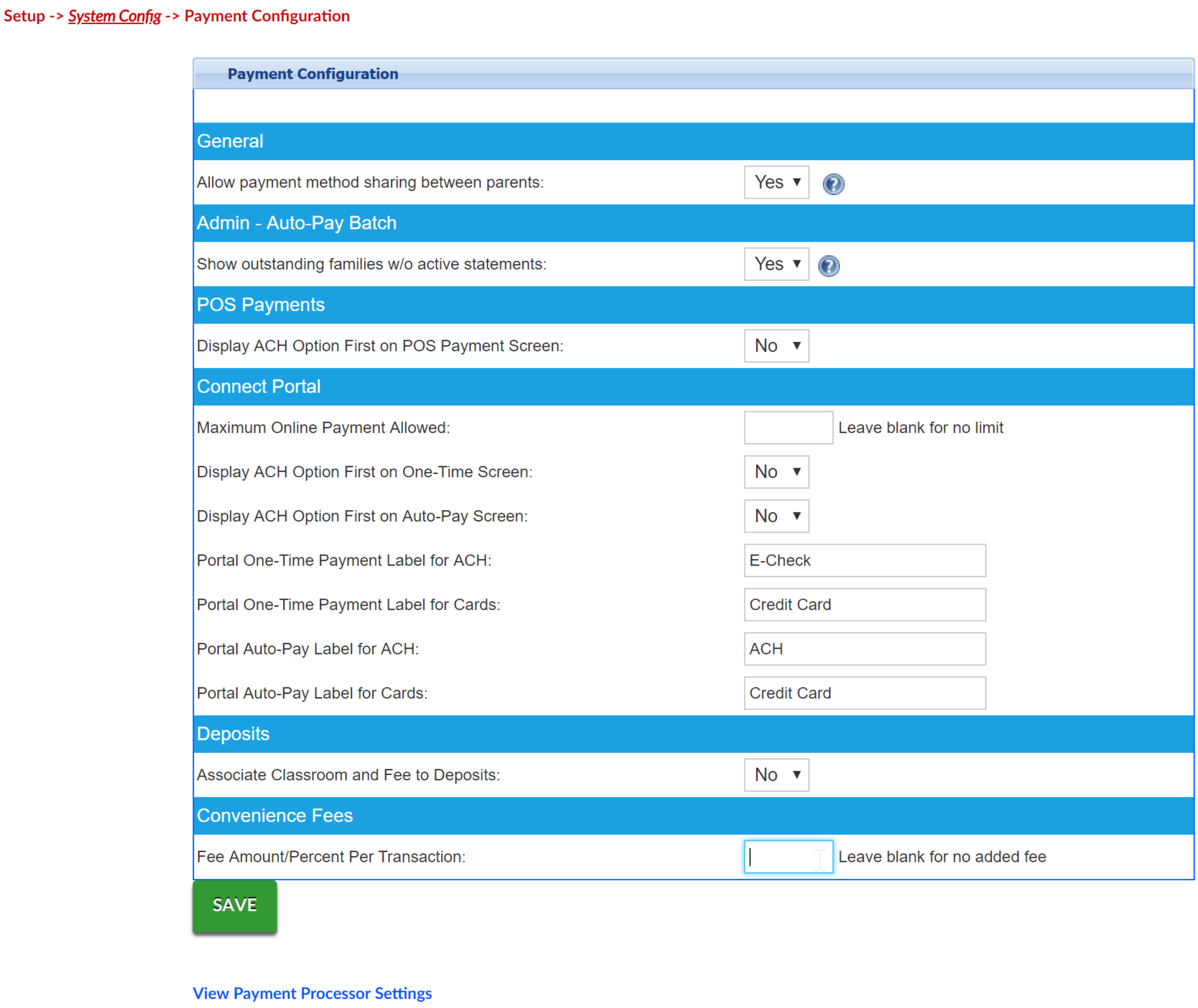


Center	Classroom	M	T	W	Th	F
DCW Transactional- Center 1	AM, Bef	10	8	10	9	10
DCW Transactional- Center 1	Flexible	1	0	0	0	0
DCW Transactional- Center 1	Flexible	0	0	0	0	0
DCW Transactional- Center 1	PM, Afte	3	3	3	3	3
DCW Transactional- Center 1	Preschoo	1	1	1	1	1

Select the Payments option-



Enter the amount parents should be charged when electronic payments are charged-


Setup -> *System Config* -> Payment Configuration

Payment Configuration

General

Allow payment method sharing between parents: Yes

Admin - Auto-Pay Batch

Show outstanding families w/o active statements: Yes

POS Payments

Display ACH Option First on POS Payment Screen: No

Connect Portal

Maximum Online Payment Allowed: Leave blank for no limit

Display ACH Option First on One-Time Screen: No

Display ACH Option First on Auto-Pay Screen: No

Portal One-Time Payment Label for ACH: E-Check

Portal One-Time Payment Label for Cards: Credit Card

Portal Auto-Pay Label for ACH: ACH

Portal Auto-Pay Label for Cards: Credit Card

Deposits

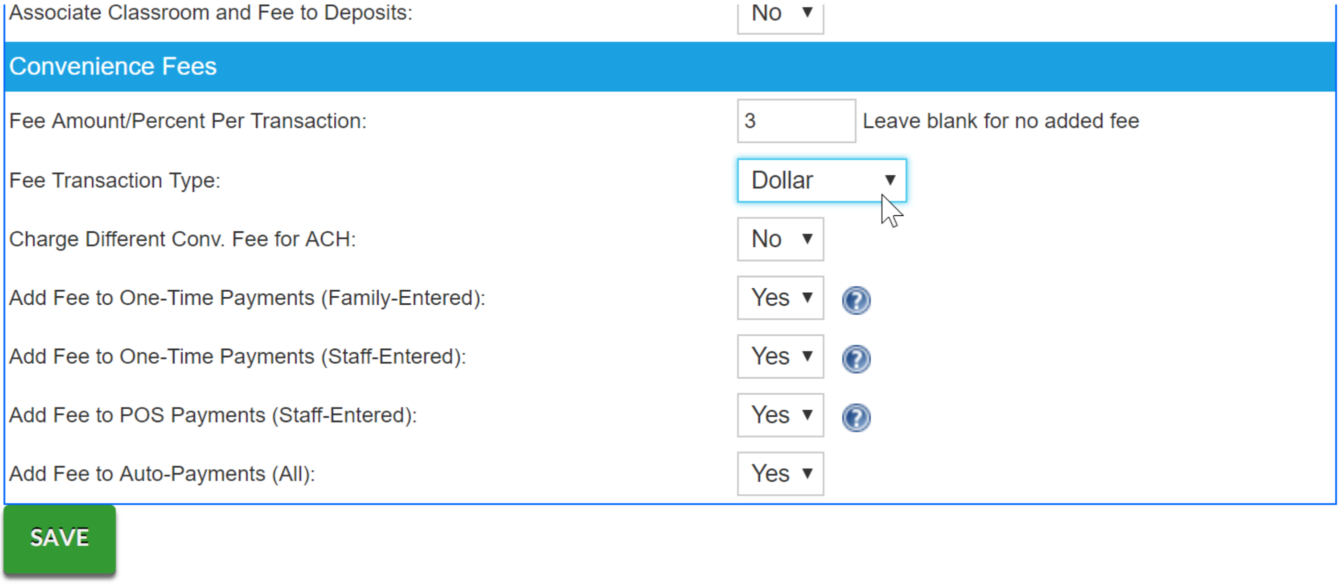
Associate Classroom and Fee to Deposits: No

Convenience Fees

Fee Amount/Percent Per Transaction: Leave blank for no added fee

Once an amount is entered into the Fee Amount field additional fields will display-

- Fee Transaction Type
  - Dollar
  - Percentage
- Charge Different Conv. Fee for ACH- if a different amount should be charged for ACH transactions
- Add Fee to One-Time Payments (Family Entered)
- Add Fee to One-Time Payments (Staff- Entered)
- Add Fee to POS Payments (Staff-Entered)
- Add Fee to Auto-Payments (All)



Associate Classroom and Fee to Deposits:	No
Convenience Fees	
Fee Amount/Percent Per Transaction:	3 Leave blank for no added fee
Fee Transaction Type:	Dollar
Charge Different Conv. Fee for ACH:	No
Add Fee to One-Time Payments (Family-Entered):	Yes
Add Fee to One-Time Payments (Staff-Entered):	Yes
Add Fee to POS Payments (Staff-Entered):	Yes
Add Fee to Auto-Payments (All):	Yes

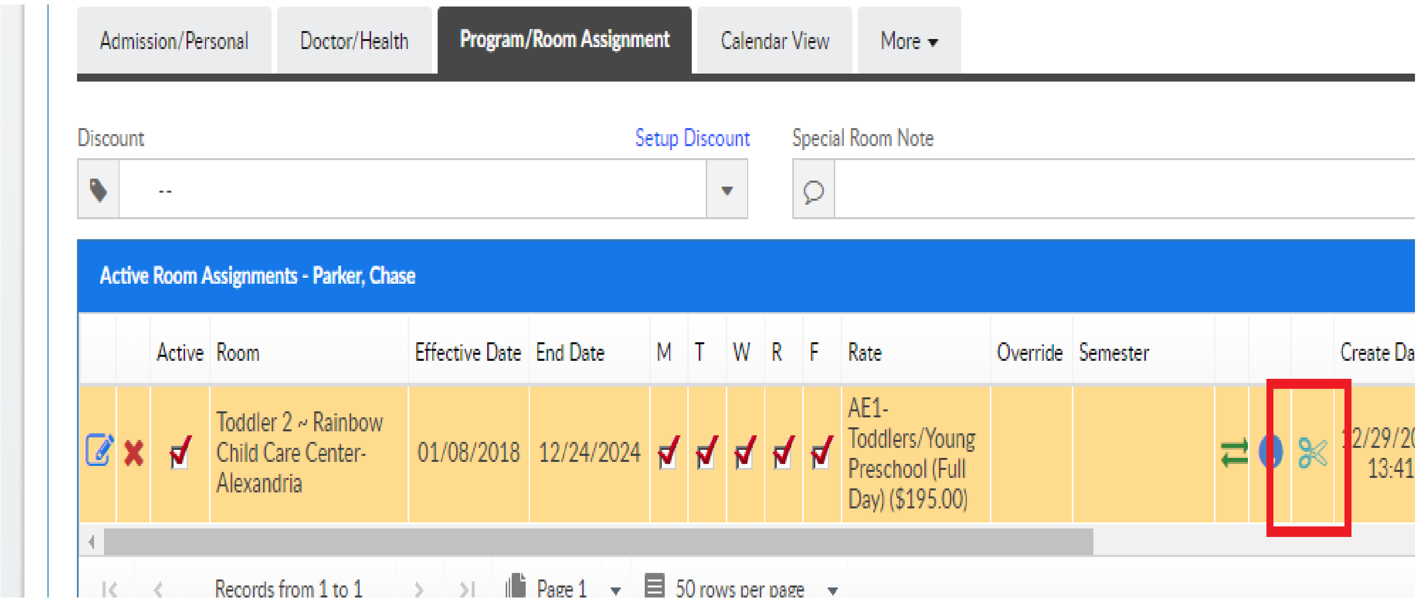
Be sure to save before exiting the screen, the changes will be immediate.

Financial- How do I add a coupon for a specific program/room assignment?

Last Modified on 06/28/2018 2:47 pm EDT

From the family record select the child tab, then go to the program/room assignment option.

On the Program/Room assignment screen, select the scissors icon.

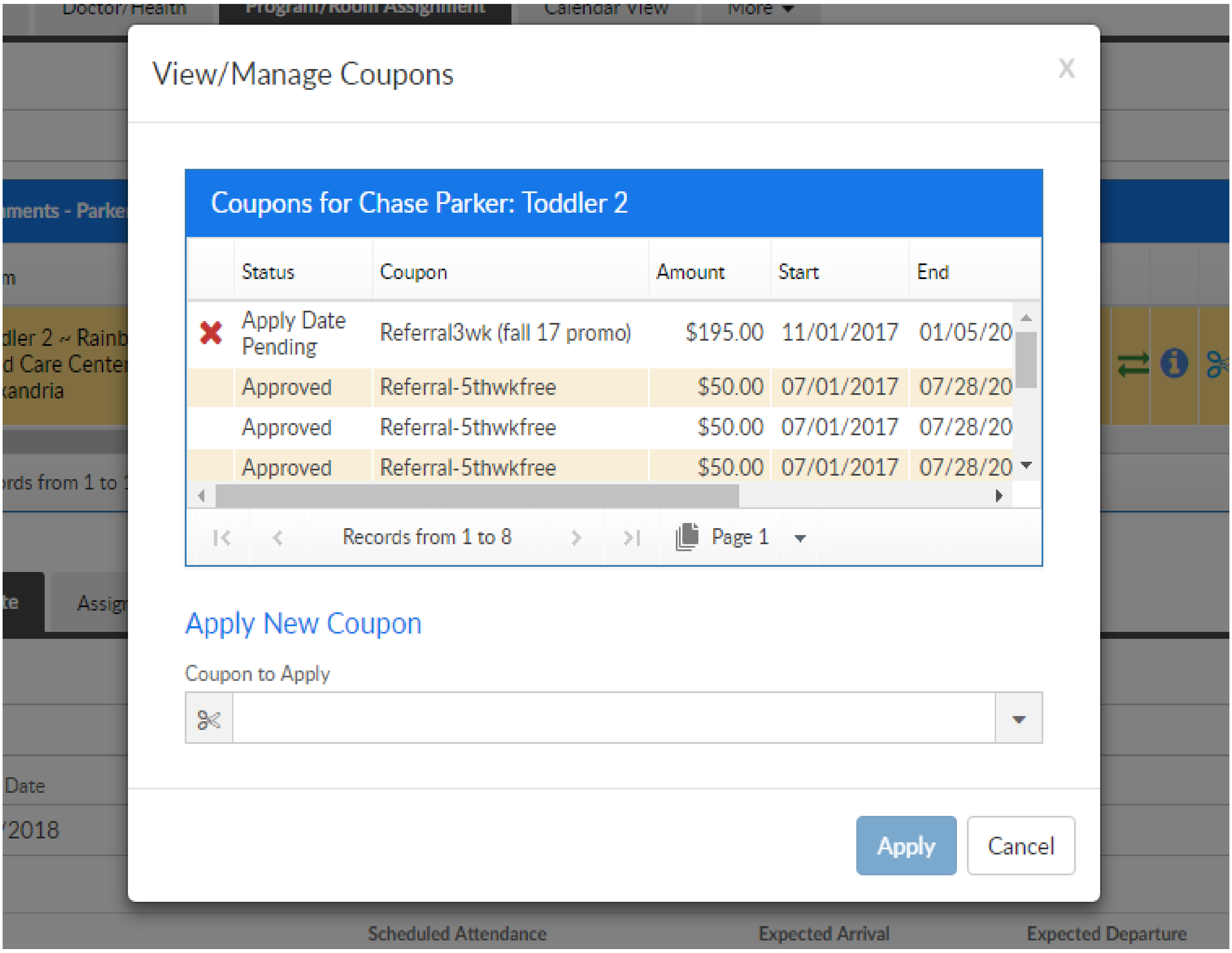


Discount: --

Active Room Assignments - Parker, Chase

Active	Room	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester	Create Da
✓	Toddler 2 ~ Rainbow Child Care Center- Alexandria	01/08/2018	12/24/2024	✓	✓	✓	✓	✓	AE1- Toddlers/Young Preschool (Full Day) ($195.00)			2/29/2 13:41

A coupon can be added to a specific program/room assignment, this means that the coupon will ONLY apply to the selected schedule.



Coupons for Chase Parker: Toddler 2

	Status	Coupon	Amount	Start	End
✖	Apply Date Pending	Referral3wk (fall 17 promo)	$195.00	11/01/2017	01/05/20
	Approved	Referral-5thwkfree	$50.00	07/01/2017	07/28/20
	Approved	Referral-5thwkfree	$50.00	07/01/2017	07/28/20
	Approved	Referral-5thwkfree	$50.00	07/01/2017	07/28/20

Records from 1 to 8 Page 1

General Rules:

- Only coupons that are available/active are loaded in the “Coupon to Apply” drop-down
- Some coupons require a specific redemption code that the user must enter for it to apply
- Some coupons have a fixed amount – for these, the Coupon Amount field is read-only
- If a coupon allows an “Apply On Date” and the user enters a date other than today, it will go into “Apply Date Pending” status. A batch job, “CouponApplyBatch”, runs and approves these types of coupons
- Coupons applied here are different than the ones from Family Financial in that they are associated directly to a child PRA
- If the scissors icon is clicked and there are no coupons available – a message pops

up explaining this

- For split families, if “Split Coupon Amount between Parents” is set to Yes, there is no parent sponsor drop-down shown and both parents will have the coupon applied to their ledgers. This option is only shown if there are 2 paying sponsor parents in the split family (sponsor = Yes and paying percentage is greater than zero).

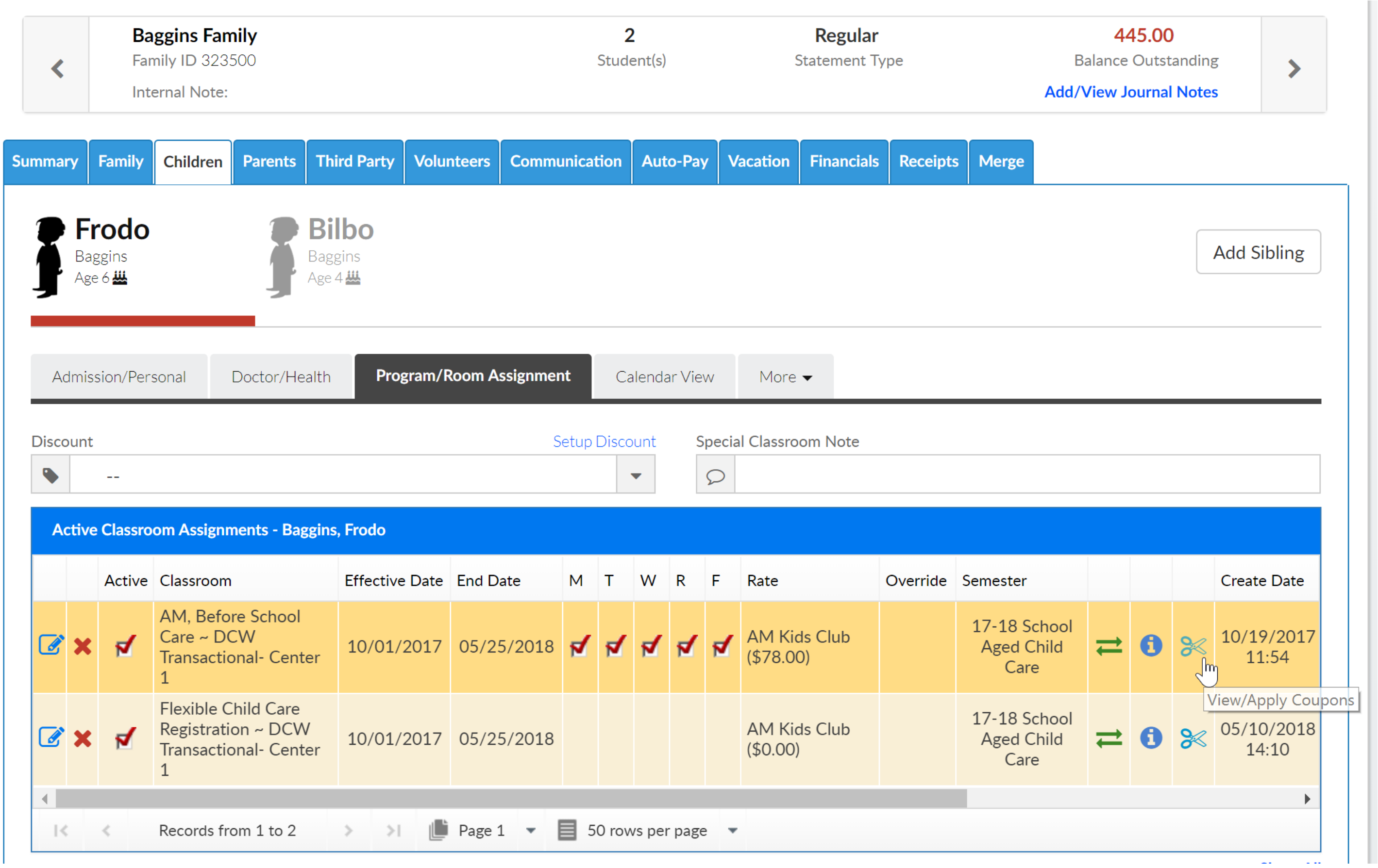
Coupons are set up under Setup > Rates > Actions > Setup Coupons.

Financial- How do I add another discount to a child (have multiple discounts on one child)?

Last Modified on 06/28/2018 2:50 pm EDT

The first step in using coupons to add another discount to a family record is to setup coupons under Setup > Rates, then select the actions menu and select Setup Coupons
.

The coupon will display as an option on a particular program/room assignment on the child tab of the family record, select the scissors icon



Baggins Family
Family ID 323500
Internal Note:

2 Student(s)

Regular Statement Type

445.00 Balance Outstanding

Add/View Journal Notes

Frodo Baggins Age 6

Bilbo Baggins Age 4

Discount: --

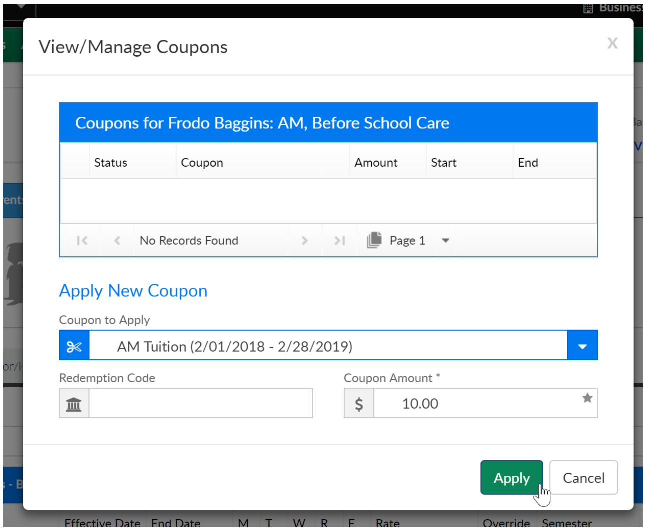
Special Classroom Note:

Active Classroom Assignments - Baggins, Frodo

		Active	Classroom	Effective Date	End Date	M	T	W	R	F	Rate	Override	Semester				Create Date
✎	✖	✓	AM, Before School Care ~ DCW Transactional- Center 1	10/01/2017	05/25/2018	✓	✓	✓	✓	✓	AM Kids Club ($78.00)		17-18 School Aged Child Care	⇄	ℹ	✂	10/19/2017 11:54
✎	✖	✓	Flexible Child Care Registration ~ DCW Transactional- Center 1	10/01/2017	05/25/2018						AM Kids Club ($0.00)		17-18 School Aged Child Care	⇄	ℹ	✂	05/10/2018 14:10

Records from 1 to 2 | Page 1 | 50 rows per page

Then select the coupon and enter details, then press Save. The coupon will be considered when billing is created.



View/Manage Coupons

Coupons for Frodo Baggins: AM, Before School Care

Status	Coupon	Amount	Start	End

No Records Found

Apply New Coupon

Coupon to Apply: AM Tuition (2/01/2018 - 2/28/2019)

Redemption Code:

Coupon Amount *: $ 10.00

Here are some rules for when the user applies a new coupon:

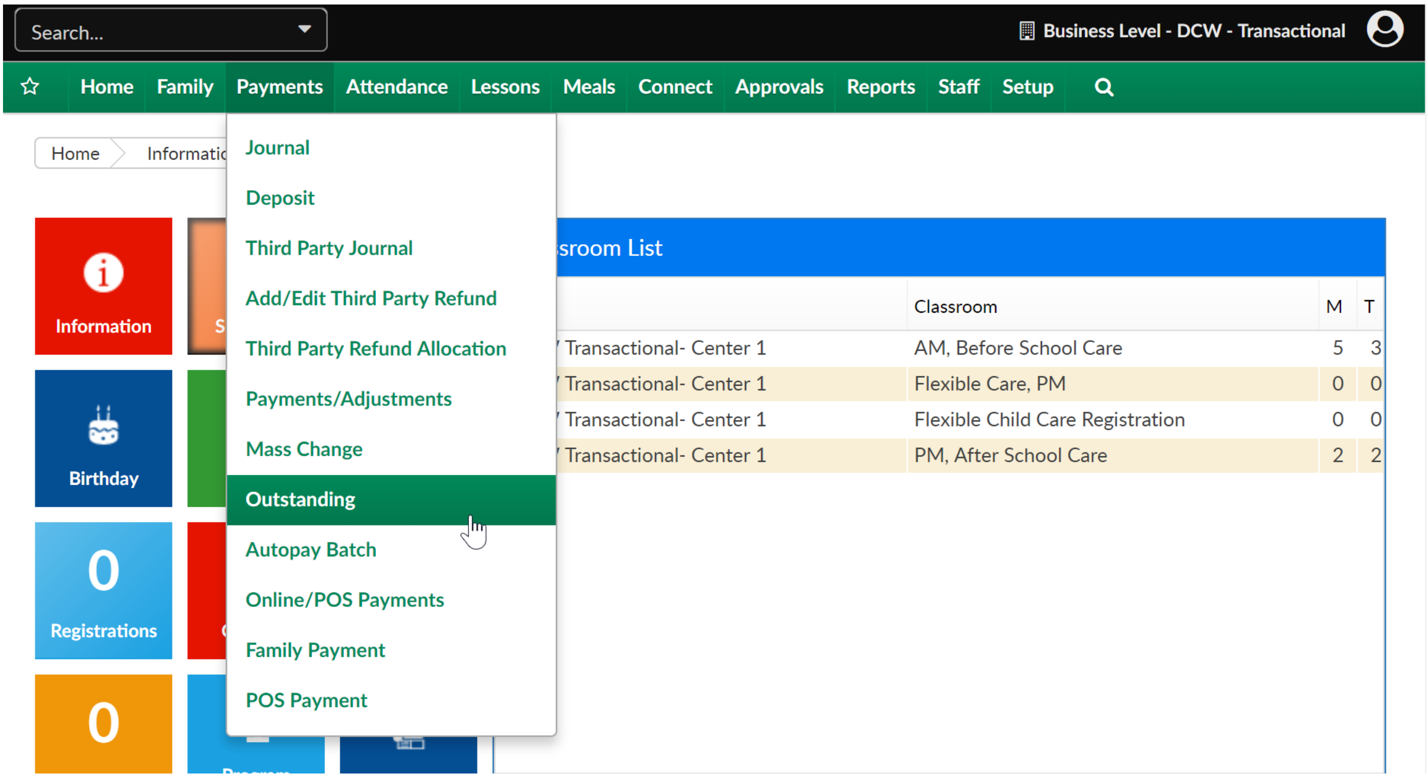
- Only coupons that are available/active are loaded in the "Coupon to Apply" drop-down
- Some coupons require a specific redemption code that the user must enter for it to apply
- Some coupons have a fixed amount – for these, the Coupon Amount field is read-only
- If a coupon allows an "Apply On Date" and the user enters a date other than today, it will go into "Apply Date Pending" status. A batch job, "CouponApplyBatch", runs and approves these types of coupons
- Coupons applied here are different than the ones from Family Financial in that they are associated directly to a child PRA
- If the scissors icon is clicked and there are no coupons available – a message pops up explaining this
- For split families, if "Split Coupon Amount between Parents" is set to Yes, there is no parent sponsor drop down shown and both parents will have the coupon applied to their ledgers. This option is only shown if there are 2 paying sponsor parents in the split family (sponsor = Yes and paying percentage is greater than zero).

Activity IDs:
New Activity ID 1725 shows/hides the Apply Coupon icon

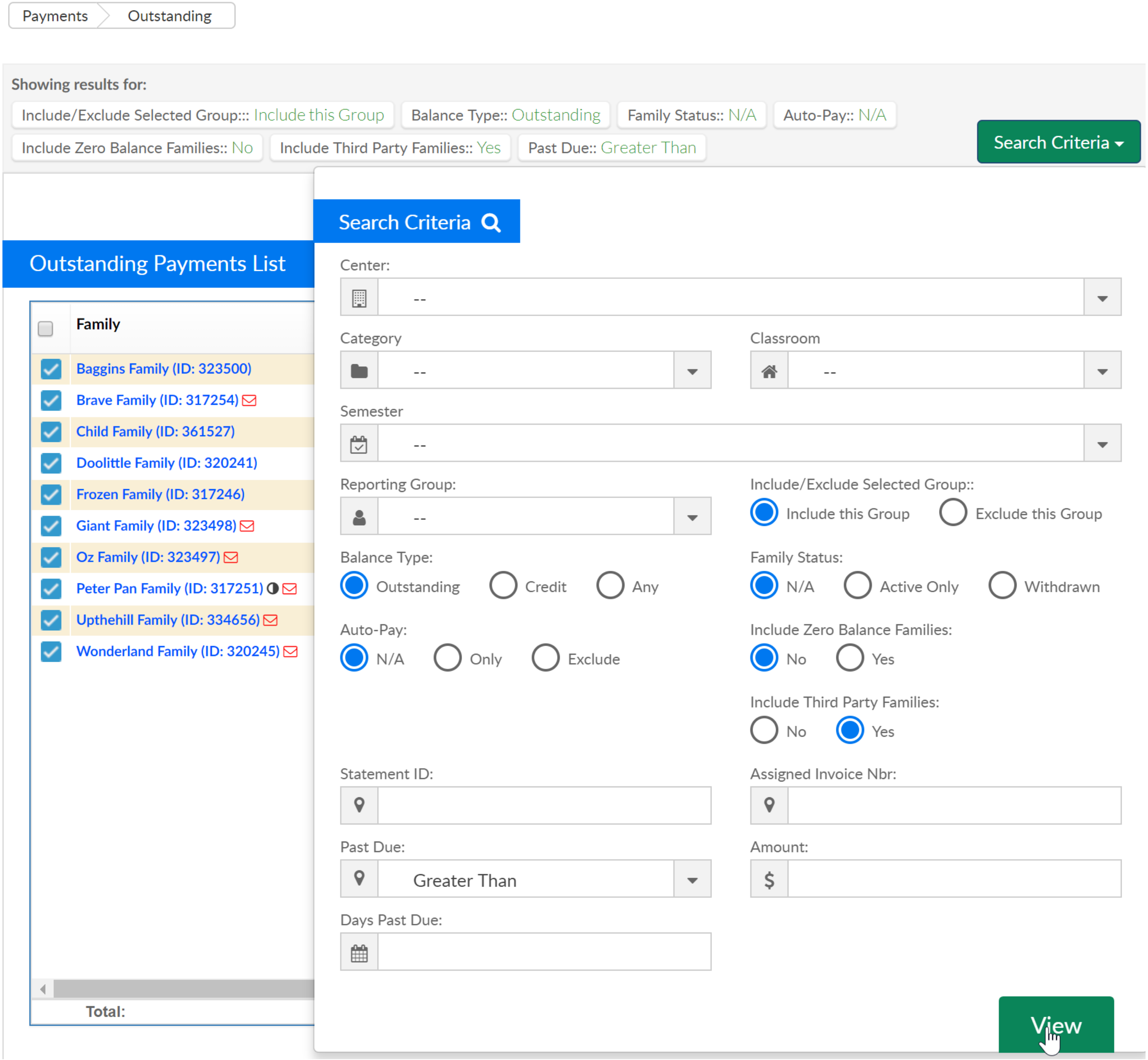
Financial- How do I run an aging report?

Last Modified on 06/28/2018 2:51 pm EDT

There are several aging reports within the system. The easiest way to pull an aging report is to go to payments > outstanding-



Enter search criteria, press view



Payments > Outstanding

Showing results for:

Include/Exclude Selected Group::: Include this Group | Balance Type:: Outstanding | Family Status:: N/A | Auto-Pay:: N/A | Include Zero Balance Families:: No | Include Third Party Families:: Yes | Past Due:: Greater Than

☐	Family
☑	Baggins Family (ID: 323500)
☑	Brave Family (ID: 317254) ✉
☑	Child Family (ID: 361527)
☑	Doolittle Family (ID: 320241)
☑	Frozen Family (ID: 317246)
☑	Giant Family (ID: 323498) ✉
☑	Oz Family (ID: 323497) ✉
☑	Peter Pan Family (ID: 317251) ◑ ✉
☑	Upthehill Family (ID: 334656) ✉
☑	Wonderland Family (ID: 320245) ✉
	Total:

Search Criteria

Center: --

Category: --

Classroom: --

Semester: --

Reporting Group: --

Include/Exclude Selected Group:: ● Include this Group ○ Exclude this Group

Balance Type: ● Outstanding ○ Credit ○ Any

Family Status: ● N/A ○ Active Only ○ Withdrawn

Auto-Pay: ● N/A ○ Only ○ Exclude

Include Zero Balance Families: ● No ○ Yes

Include Third Party Families: ○ No ● Yes

Statement ID:

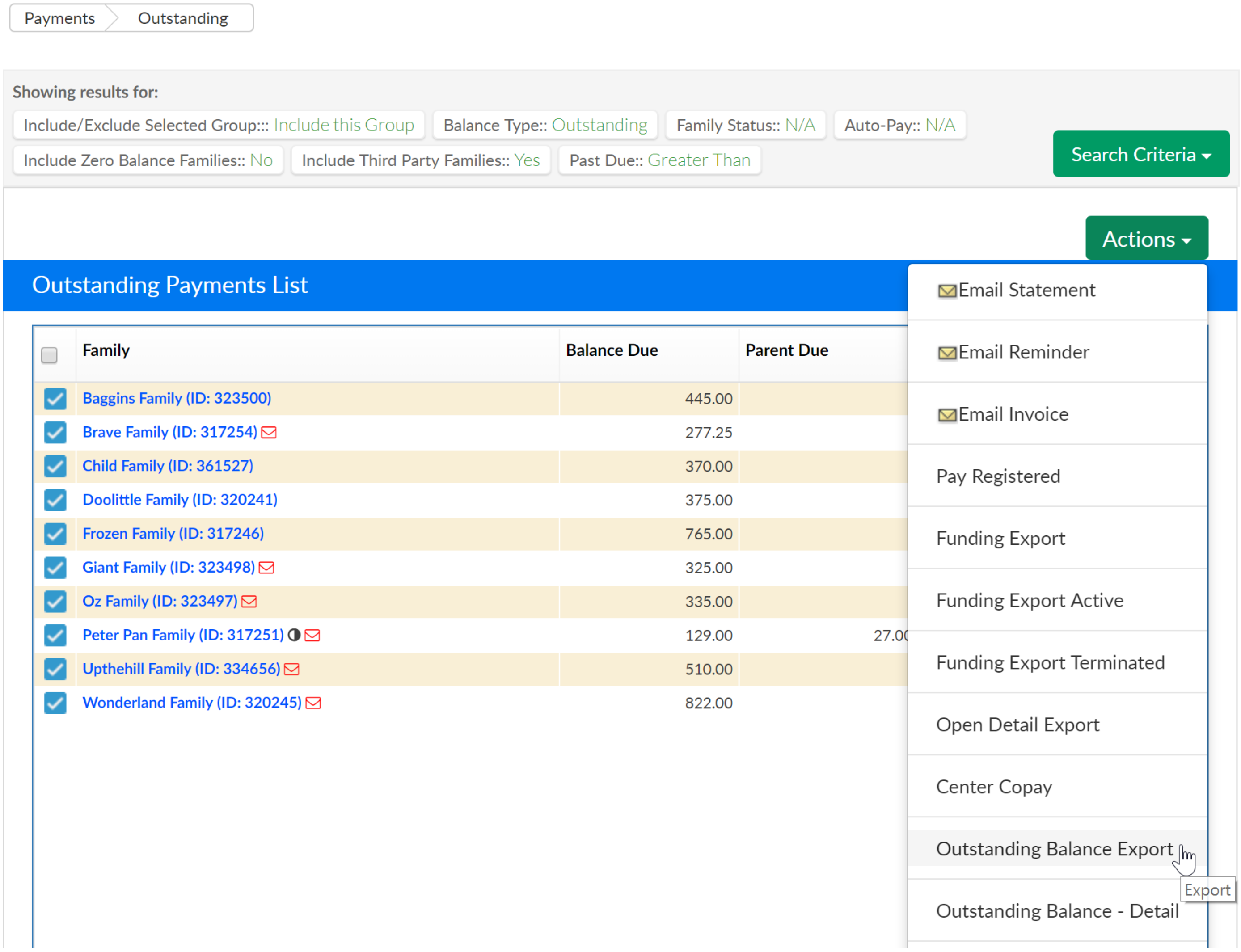
Assigned Invoice Nbr:

Past Due: Greater Than

Amount: $

Days Past Due:

Then select the actions icon and choose Outstanding Balance Export or Outstanding Balance- Detail.



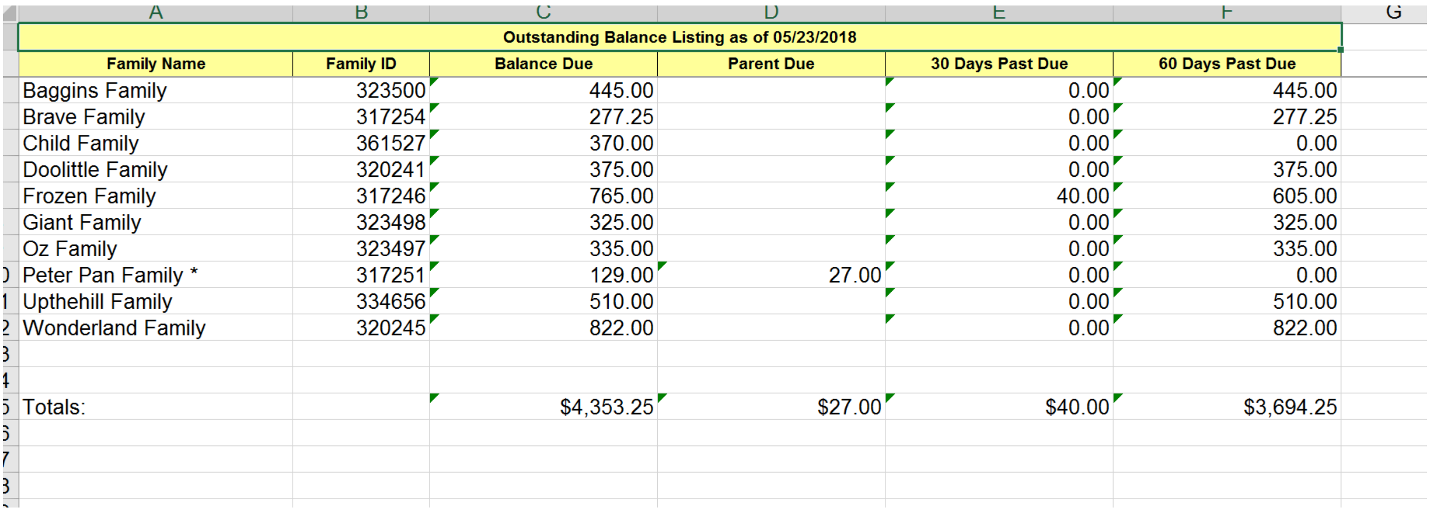
Showing results for:

Include/Exclude Selected Group::: Include this Group
Balance Type:: Outstanding
Family Status:: N/A
Auto-Pay:: N/A
Include Zero Balance Families:: No
Include Third Party Families:: Yes
Past Due:: Greater Than

Outstanding Payments List

☐	Family	Balance Due	Parent Due
☑	Baggins Family (ID: 323500)	445.00	
☑	Brave Family (ID: 317254) ✉	277.25	
☑	Child Family (ID: 361527)	370.00	
☑	Doolittle Family (ID: 320241)	375.00	
☑	Frozen Family (ID: 317246)	765.00	
☑	Giant Family (ID: 323498) ✉	325.00	
☑	Oz Family (ID: 323497) ✉	335.00	
☑	Peter Pan Family (ID: 317251) ◑ ✉	129.00	27.0
☑	Upthehill Family (ID: 334656) ✉	510.00	
☑	Wonderland Family (ID: 320245) ✉	822.00	

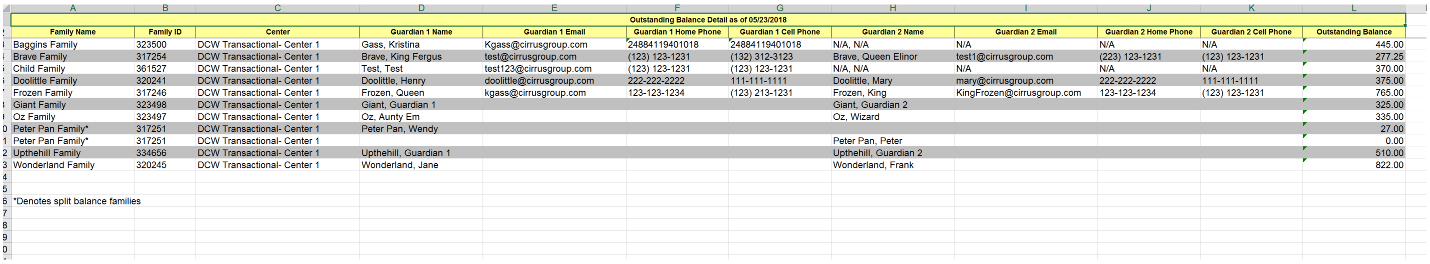
Outstanding Balance Export



Outstanding Balance Listing as of 05/23/2018

Family Name	Family ID	Balance Due	Parent Due	30 Days Past Due	60 Days Past Due
Baggins Family	323500	445.00		0.00	445.00
Brave Family	317254	277.25		0.00	277.25
Child Family	361527	370.00		0.00	0.00
Doolittle Family	320241	375.00		0.00	375.00
Frozen Family	317246	765.00		40.00	605.00
Giant Family	323498	325.00		0.00	325.00
Oz Family	323497	335.00		0.00	335.00
Peter Pan Family *	317251	129.00	27.00	0.00	0.00
Upthehill Family	334656	510.00		0.00	510.00
Wonderland Family	320245	822.00		0.00	822.00
Totals:		$4,353.25	$27.00	$40.00	$3,694.25

Outstanding Balance- Detail



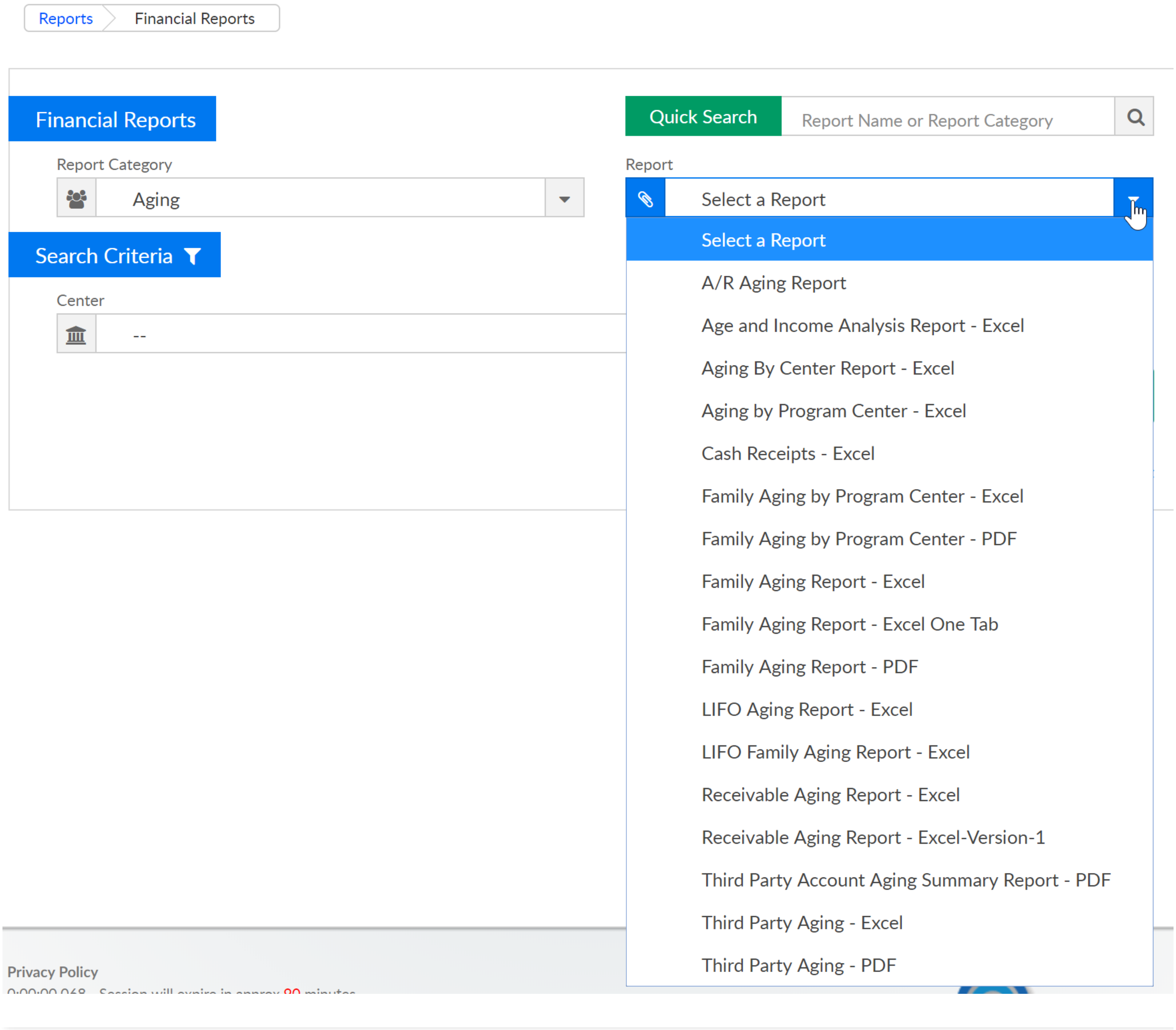
Outstanding Balance Detail as of 05/23/2018

Family Name	Family ID	Center	Guardian 1 Name	Guardian 1 Email	Guardian 1 Home Phone	Guardian 1 Cell Phone	Guardian 2 Name	Guardian 2 Email	Guardian 2 Home Phone	Guardian 2 Cell Phone	Outstanding Balance
Baggins Family	323500	DCW Transactional- Center 1	Gass, Kristina	Kgass@cirrusgroup.com	24884119401018	24884119401018	N/A, N/A	N/A	N/A	N/A	445.00
Brave Family	317254	DCW Transactional- Center 1	Brave, King Fergus	test@cirrusgroup.com	(123) 123-1231	(132) 312-3123	Brave, Queen Elinor	test1@cirrusgroup.com	(223) 123-1231	(123) 123-1231	277.25
Child Family	361527	DCW Transactional- Center 1	Test, Test	test123@cirrusgroup.com	(123) 123-1231	(123) 123-1231	N/A, N/A	N/A	N/A	N/A	370.00
Doolittle Family	320241	DCW Transactional- Center 1	Doolittle, Henry	doolittle@cirrusgroup.com	222-222-2222	111-111-1111	Doolittle, Mary	mary@cirrusgroup.com	222-222-2222	111-111-1111	375.00
Frozen Family	317246	DCW Transactional- Center 1	Frozen, Queen	kgass@cirrusgroup.com	123-123-1234	(123) 213-1231	Frozen, King	KingFrozen@cirrusgroup.com	123-123-1234	(123) 123-1231	765.00
Giant Family	323498	DCW Transactional- Center 1	Giant, Guardian 1				Giant, Guardian 2				325.00
Oz Family	323497	DCW Transactional- Center 1	Oz, Aunty Em				Oz, Wizard				335.00
Peter Pan Family*	317251	DCW Transactional- Center 1	Peter Pan, Wendy								27.00
Peter Pan Family*	317251	DCW Transactional- Center 1					Peter Pan, Peter				0.00
Upthehill Family	334656	DCW Transactional- Center 1	Upthehill, Guardian 1				Upthehill, Guardian 2				510.00
Wonderland Family	320245	DCW Transactional- Center 1	Wonderland, Jane				Wonderland, Frank				822.00

*Denotes split balance families

Other Aging Report Options can be found by going to Reports > Financial and selecting the aging report category .

- Aging- A/R Aging Report- multi-tab
- Family Aging Report- Excel One Tab- this will only pull family balances not third party/sponsor balances
- Third Party Aging- this report will display third party/sponsor balances owed



- Select a Report
- A/R Aging Report
- Age and Income Analysis Report - Excel
- Aging By Center Report - Excel
- Aging by Program Center - Excel
- Cash Receipts - Excel
- Family Aging by Program Center - Excel
- Family Aging by Program Center - PDF
- Family Aging Report - Excel
- Family Aging Report - Excel One Tab
- Family Aging Report - PDF
- LIFO Aging Report - Excel
- LIFO Family Aging Report - Excel
- Receivable Aging Report - Excel
- Receivable Aging Report - Excel-Version-1
- Third Party Account Aging Summary Report - PDF
- Third Party Aging - Excel
- Third Party Aging - PDF

Financial- How do I write off bad debt?

Last Modified on 03/08/2018 1:53 pm EST

The Charge/Reduce Revenue section allows administrators the ability to simplify adjustments made to financial ledgers for families in the system.

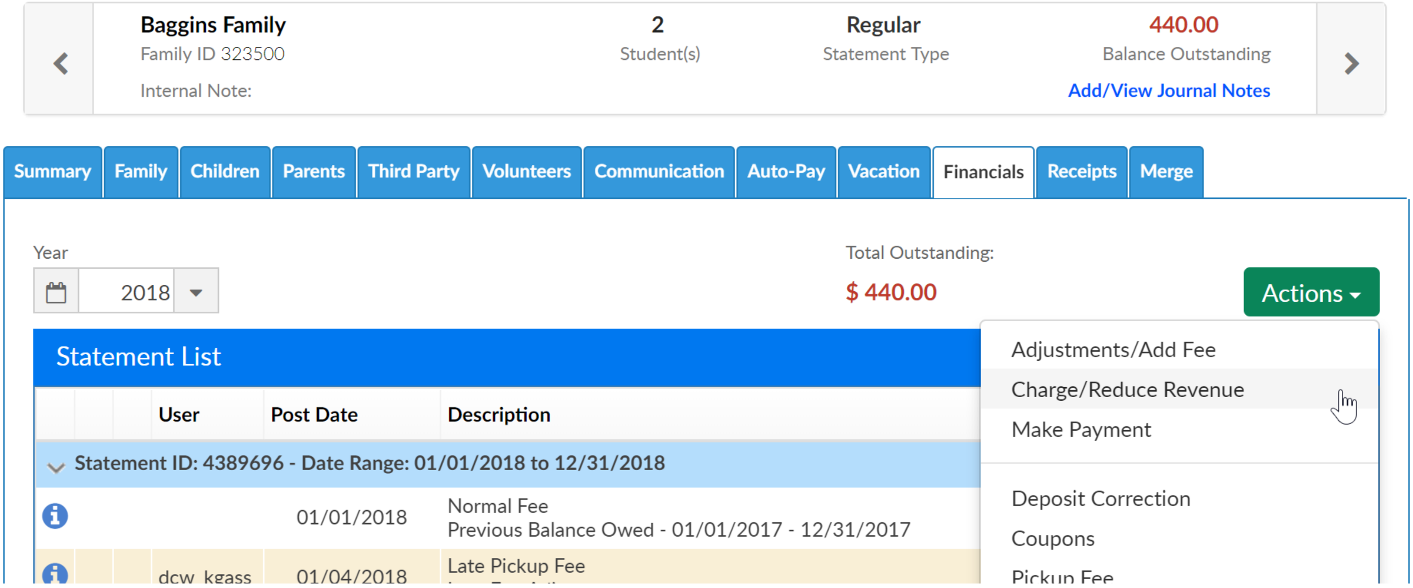
- Using this method, administrators can select what Type - Fee Valid Values can be setup in the system to have a write off adjustment.
- For a Type - Fee Valid Value to be used to write off, Write-Off Family Bad Debt must be selected in the Revenue Adjustment Type drop down list.

Here are the directions for how to add a type > fee valid value

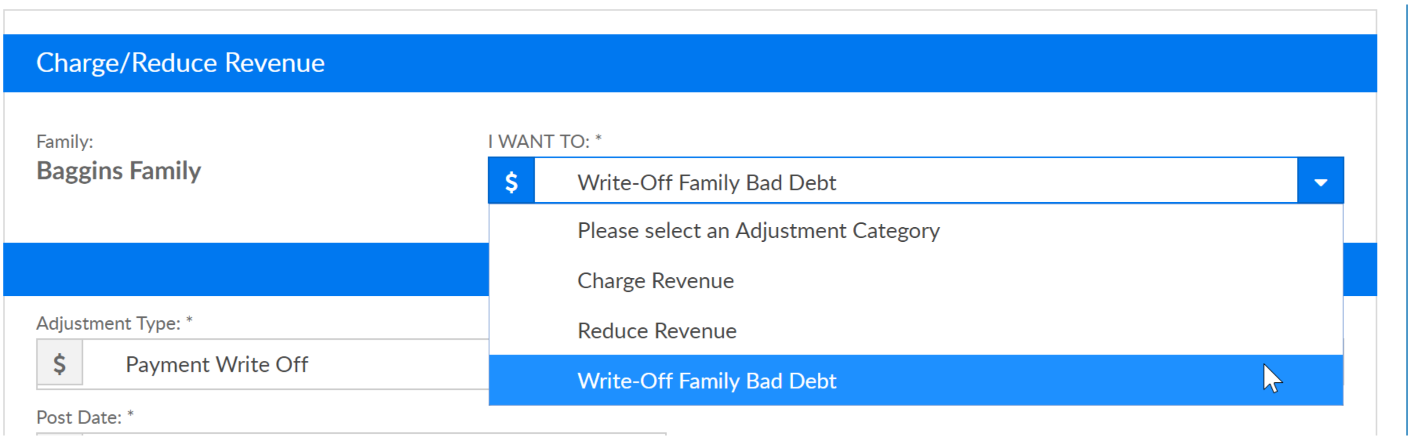
---

Go to the family's financial ledger (how to search for a family)

Then on the family's financial ledger select the Actions menu, then select Charge/Reduce revenue.



Select the option- Write Off Family Bad Debt from the I WANT TO field.



Charge/Reduce Revenue

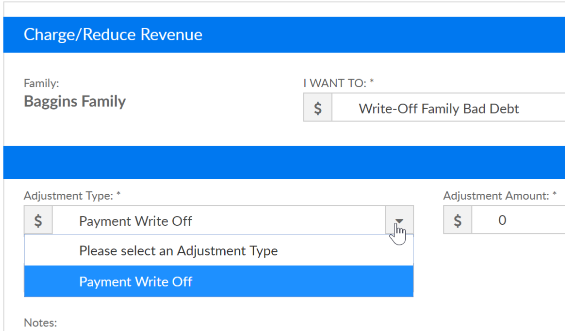
Family:
Baggins Family

I WANT TO: *
Write-Off Family Bad Debt

Adjustment Type: *
Payment Write Off

Post Date: *

Under the adjustment type menu select the Payment Write Off valid value.



Charge/Reduce Revenue

Family:
Baggins Family

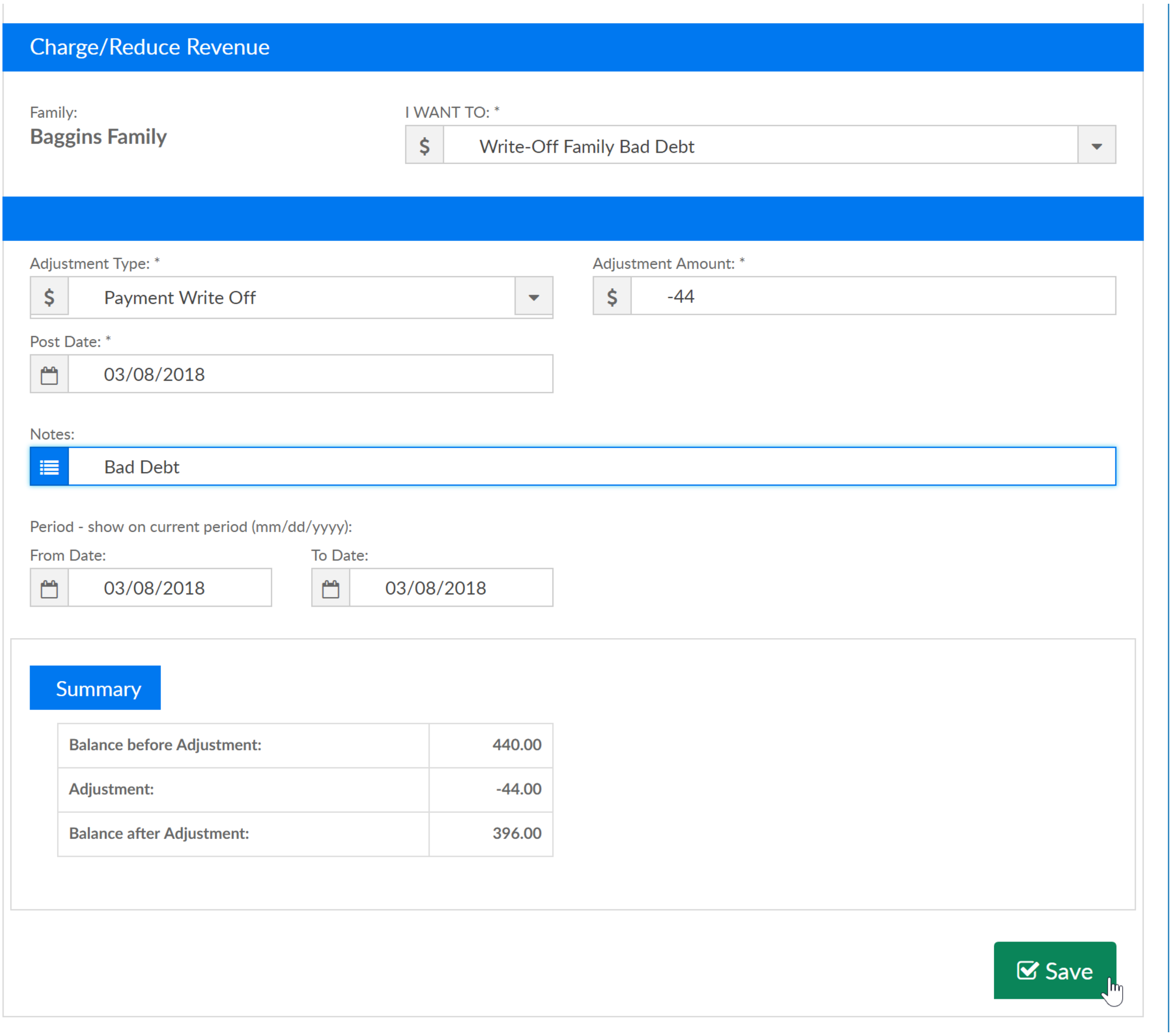
I WANT TO: *
Write-Off Family Bad Debt

Adjustment Type: *
Payment Write Off

Adjustment Amount: *
0

Notes:

Enter the adjustment amount, post date and any related note, then press Save.



Charge/Reduce Revenue

Family: Baggins Family

I WANT TO: * Write-Off Family Bad Debt

Adjustment Type: * Payment Write Off

Adjustment Amount: * -44

Post Date: * 03/08/2018

Notes: Bad Debt

Period - show on current period (mm/dd/yyyy):

From Date: 03/08/2018

To Date: 03/08/2018

Summary

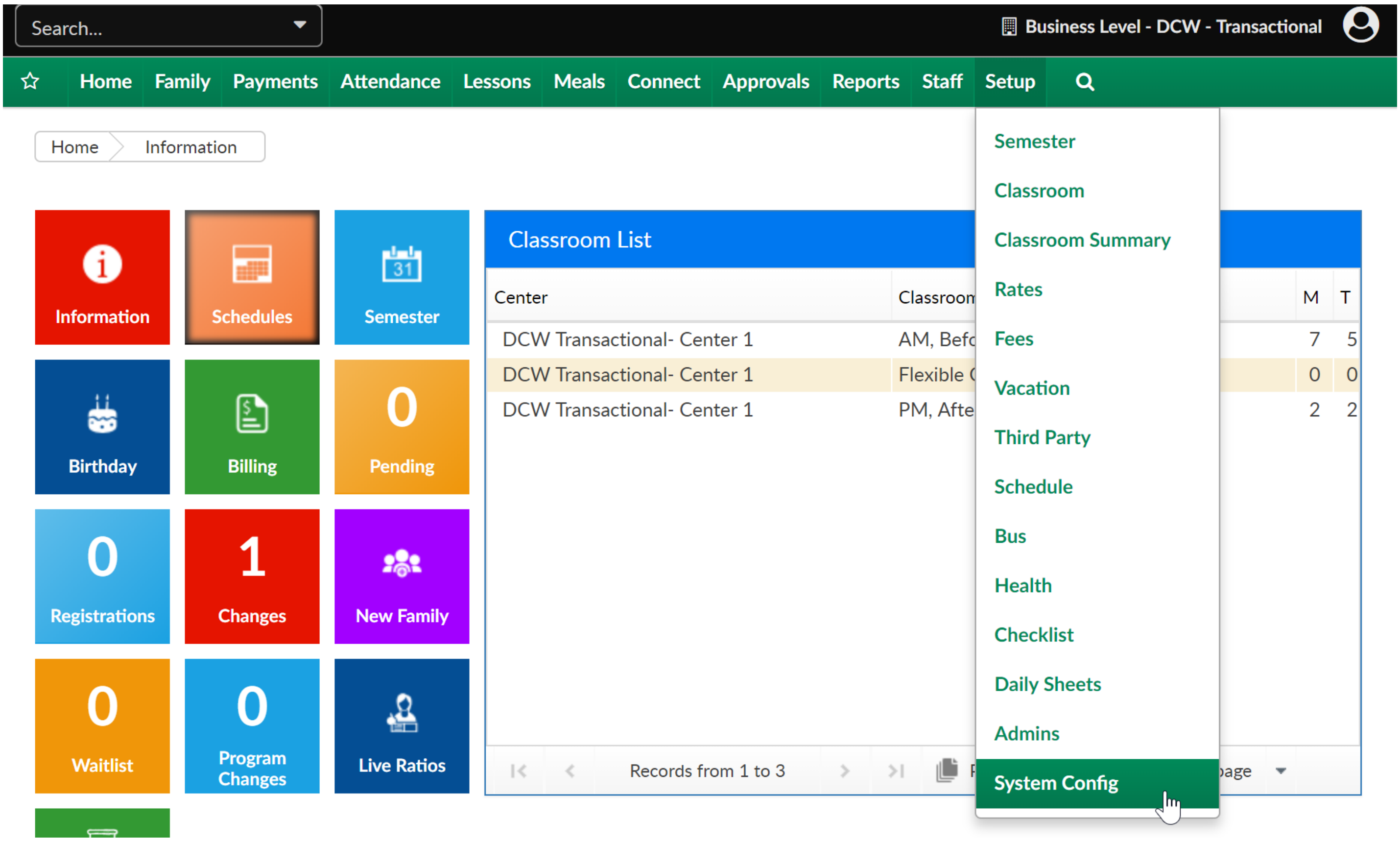
Balance before Adjustment:	440.00
Adjustment:	-44.00
Balance after Adjustment:	396.00

Financial- How do I add or update a check unlock code?

Last Modified on 03/30/2018 12:59 pm EDT

Check unlock codes allow families the ability to register for a program without paying the registration or other fees up front. These codes would need to be given to parents in order for them to be able to use a code during registration.

From the Setup menu, select System Config, then select the registration tile.

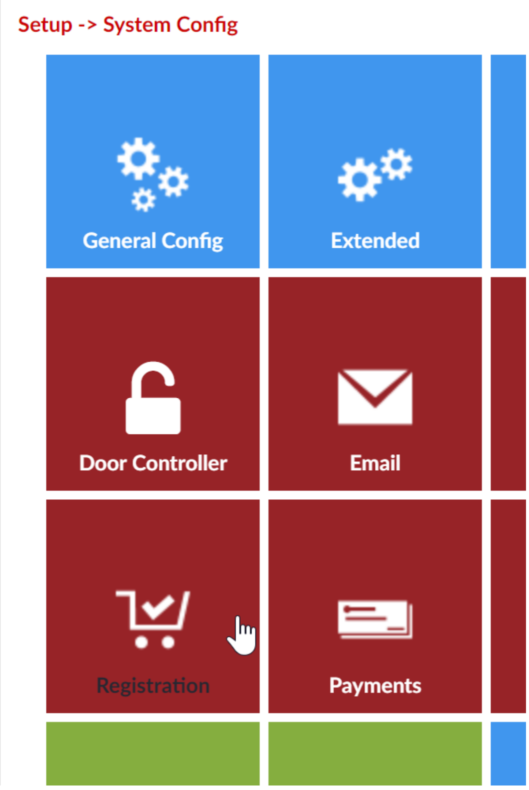


Classroom List

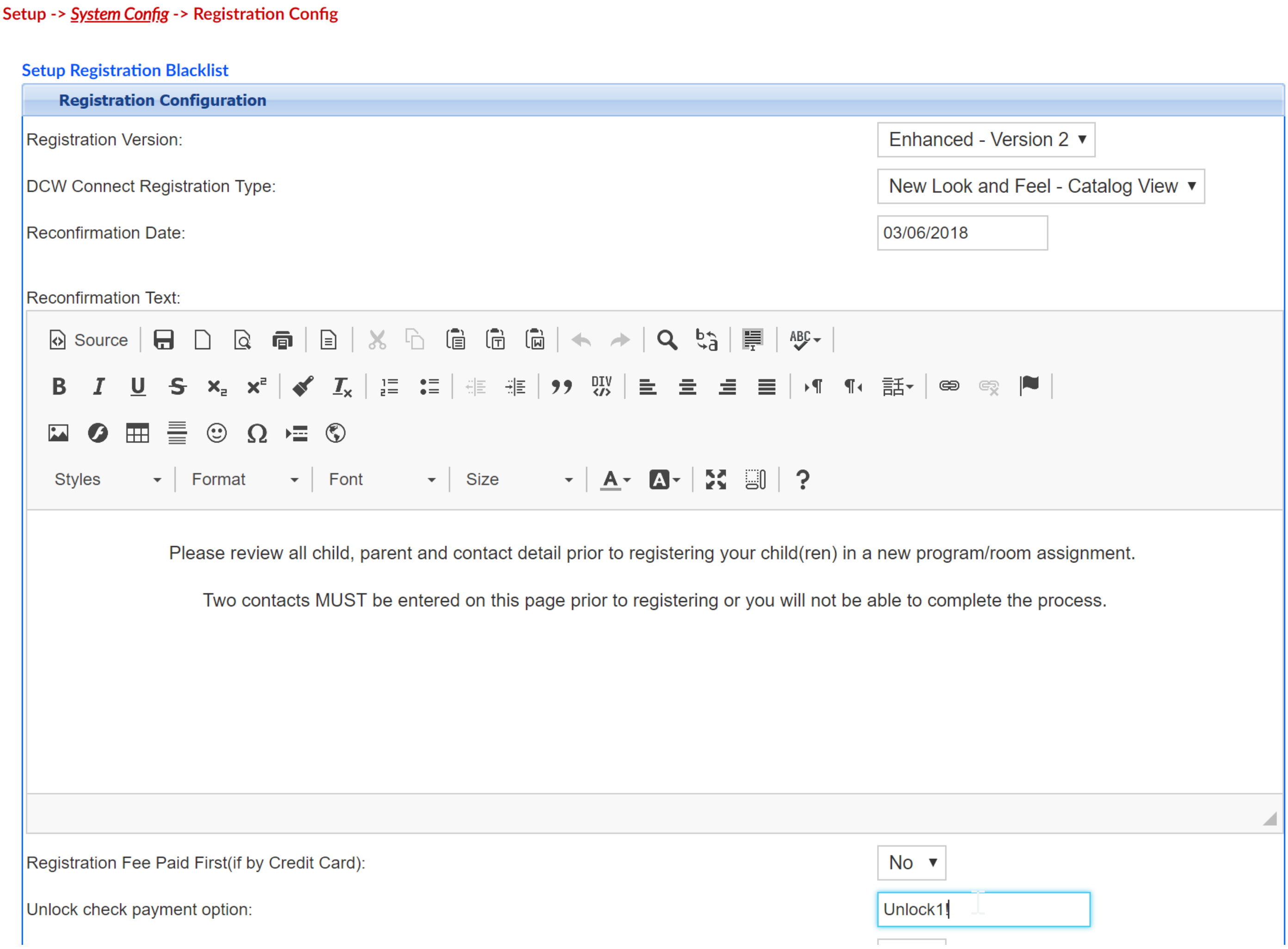
Center	Classroom	M	T
DCW Transactional- Center 1	AM, Befo	7	5
DCW Transactional- Center 1	Flexible (	0	0
DCW Transactional- Center 1	PM, Afte	2	2

Records from 1 to 3

Then select Registration-


Setup -> System Config

Enter the unlock code you want to give to parents to pay by check, then scroll to the bottom of the page and press Save.


Setup -> System Config -> Registration Config

Setup Registration Blacklist

Registration Configuration

Registration Version:	Enhanced - Version 2
DCW Connect Registration Type:	New Look and Feel - Catalog View
Reconfirmation Date:	03/06/2018

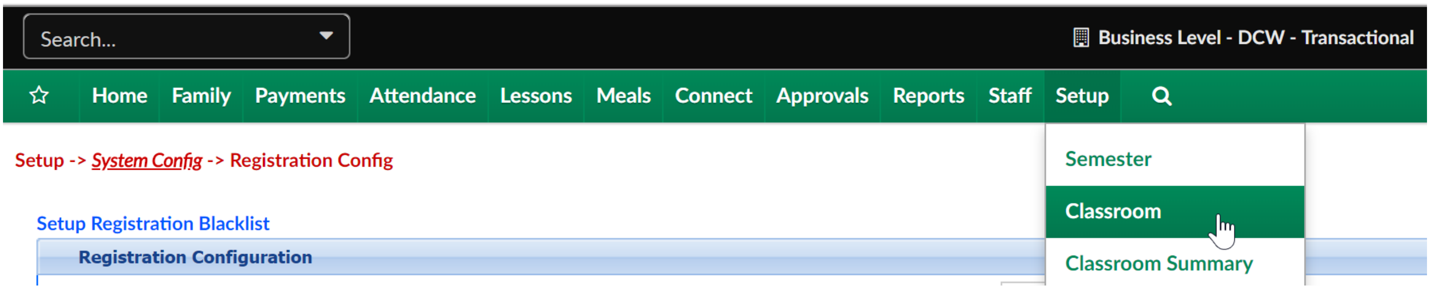
Reconfirmation Text:

Please review all child, parent and contact detail prior to registering your child(ren) in a new program/room assignment.

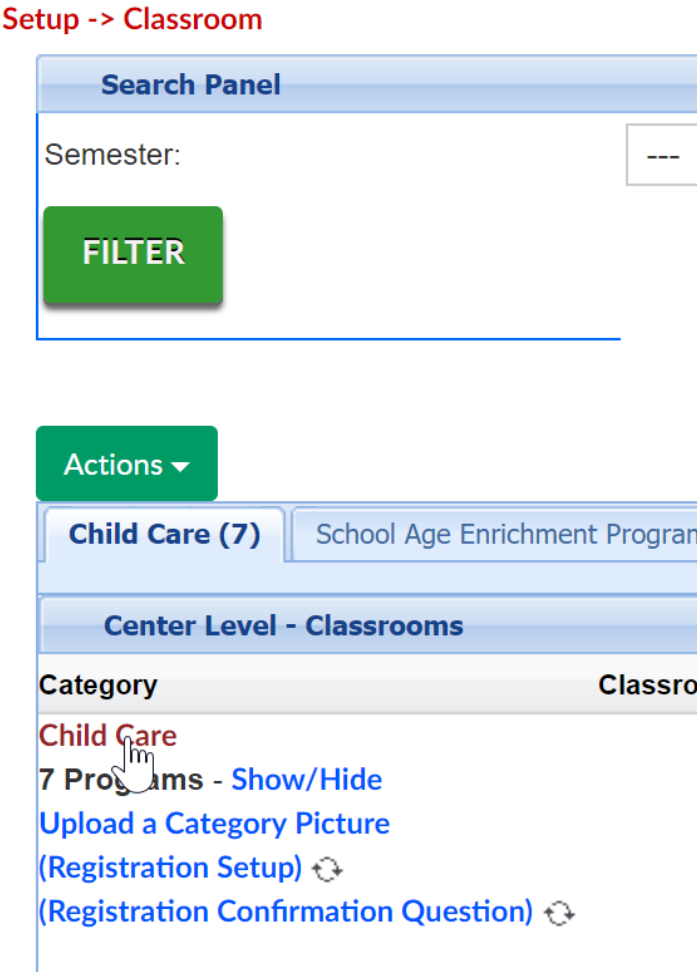
Two contacts MUST be entered on this page prior to registering or you will not be able to complete the process.

Registration Fee Paid First(if by Credit Card):	No
Unlock check payment option:	Unlock1!

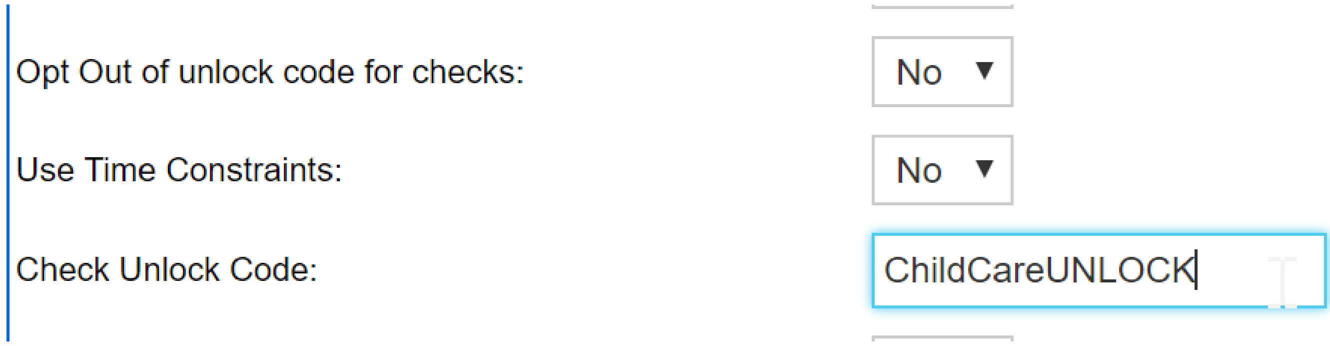
You can also specify a check unlock code by specific category. Go to Setup > Classroom



Select the name of a Category



Change Opt Out of Unlock Code for Checks to No and then enter the text/numbers that parents will use to unlock the check option during registration.



Opt Out of unlock code for checks: No

Use Time Constraints: No

Check Unlock Code: ChildCareUNLOCK

Scroll to the bottom of the page and Save.

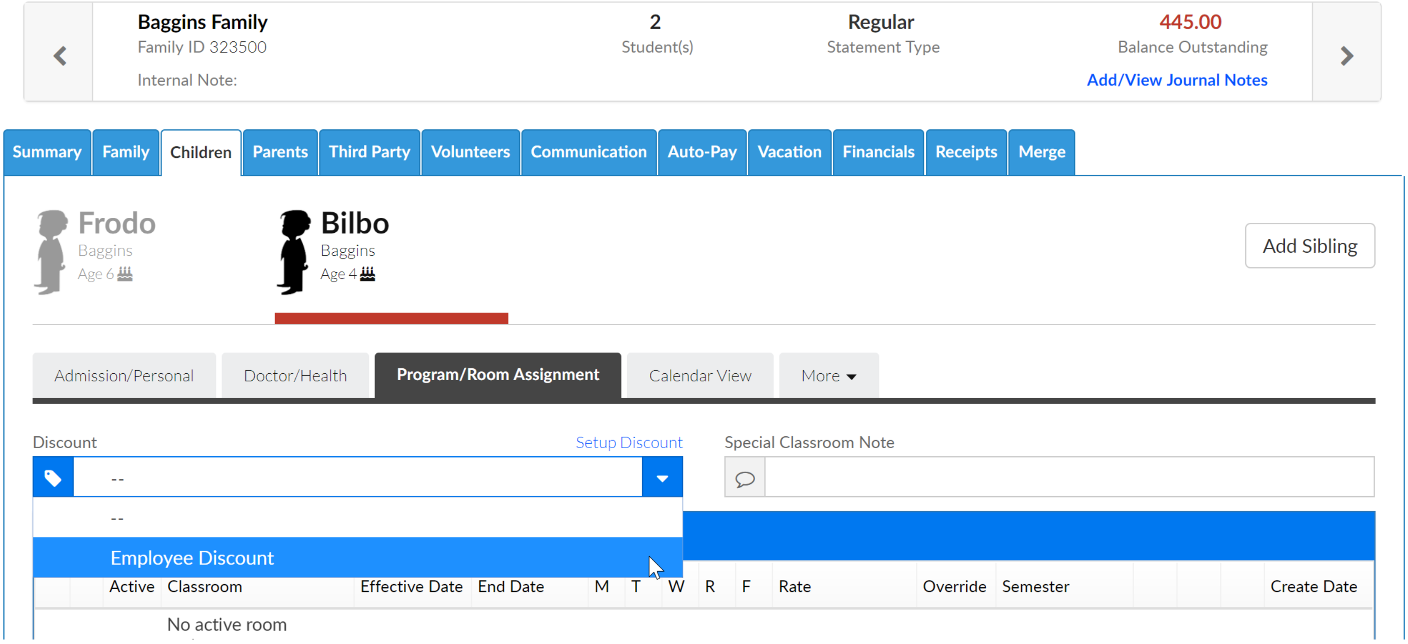
To update a Check Unlock code go to either area and type over the text that is in the check unlock field, then Save.

Financial- How to I add or update a discount associated to a child?

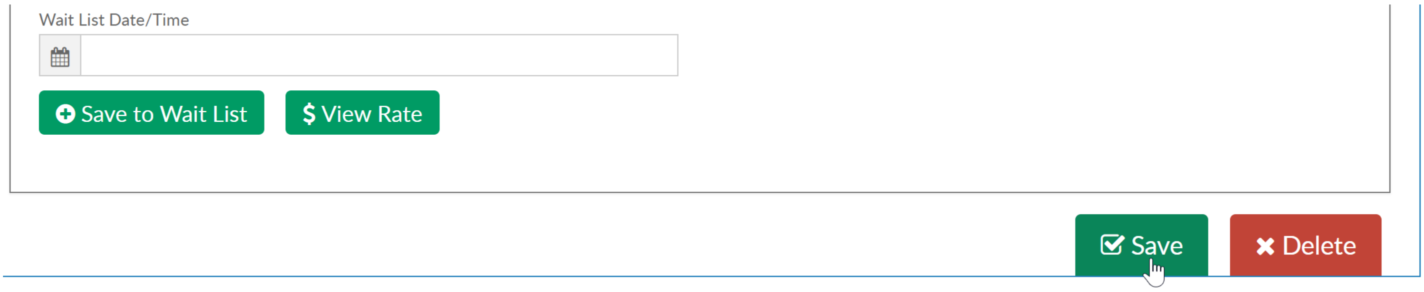
Last Modified on 04/04/2018 2:39 pm EDT

From the family record, select the Program/Room assignment tab on the Child record.

From the discount drop down list select the correct discount-



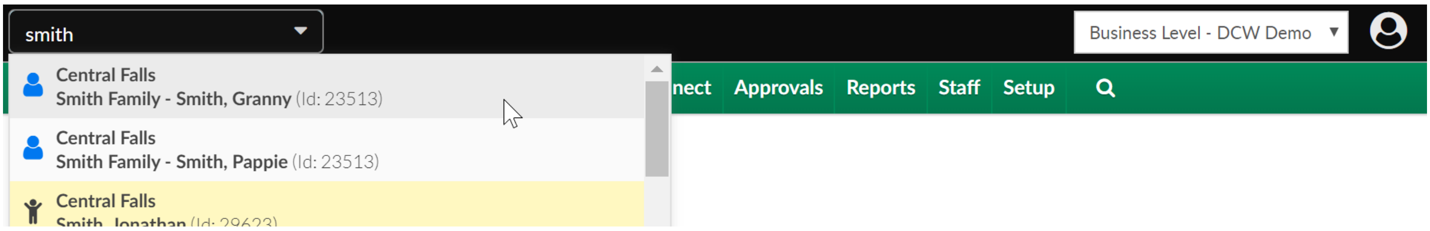
Once the discount has been selected scroll to the bottom of the page and press Save.



Financial- How do I record a credit card or ACH payment for a family in the system?

Last Modified on 05/01/2018 12:21 pm EDT

Go to the family's financial record.



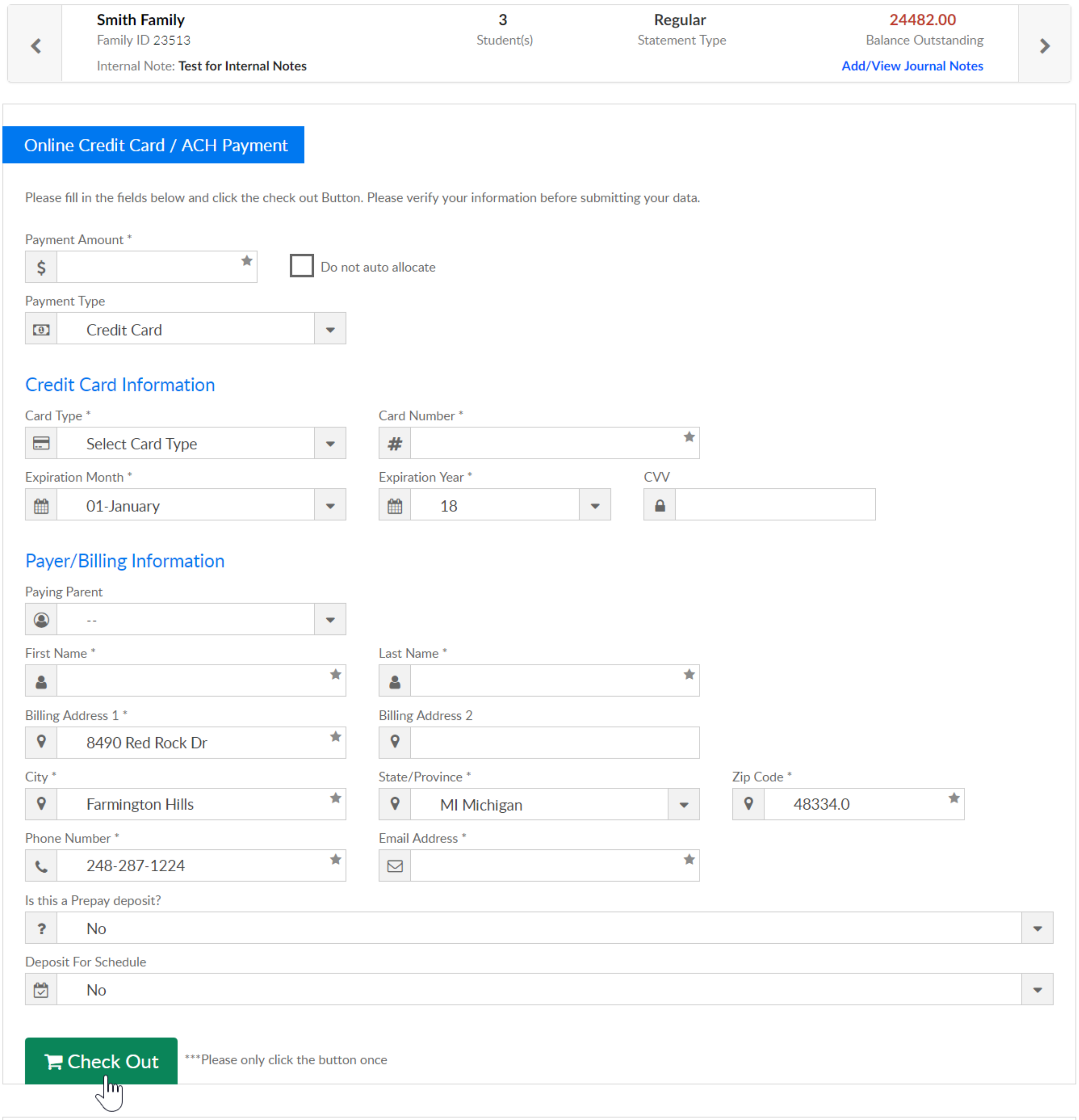
On the financial page, select the actions button- then select Online Credit Card-

On the payment screen, enter the payment amount then select the payment type.

From this screen only Credit Card and ACH payments can be made.

Enter credit card or ACH detail in the credit card information section. Then select the payer and related detail.

Once the payment detail has been entered, select Check Out to process the payment. ONLY CLICK THIS BUTTON ONCE.



Smith Family
Family ID 23513
Internal Note: **Test for Internal Notes**

3
Student(s)

Regular
Statement Type

24482.00
Balance Outstanding
Add/View Journal Notes

Online Credit Card / ACH Payment

Please fill in the fields below and click the check out Button. Please verify your information before submitting your data.

Payment Amount *: $
☐ Do not auto allocate

Payment Type: Credit Card

Credit Card Information

Card Type *: Select Card Type
Card Number *:
Expiration Month *: 01-January
Expiration Year *: 18
CVV:

Payer/Billing Information

Paying Parent: --
First Name *:
Last Name *:
Billing Address 1 *: 8490 Red Rock Dr
Billing Address 2:
City *: Farmington Hills
State/Province *: MI Michigan
Zip Code *: 48334.0
Phone Number *: 248-287-1224
Email Address *:
Is this a Prepay deposit?: No
Deposit For Schedule: No

***Please only click the button once

The payment will be processed through the gateway and will immediately display on the family's financial ledger.

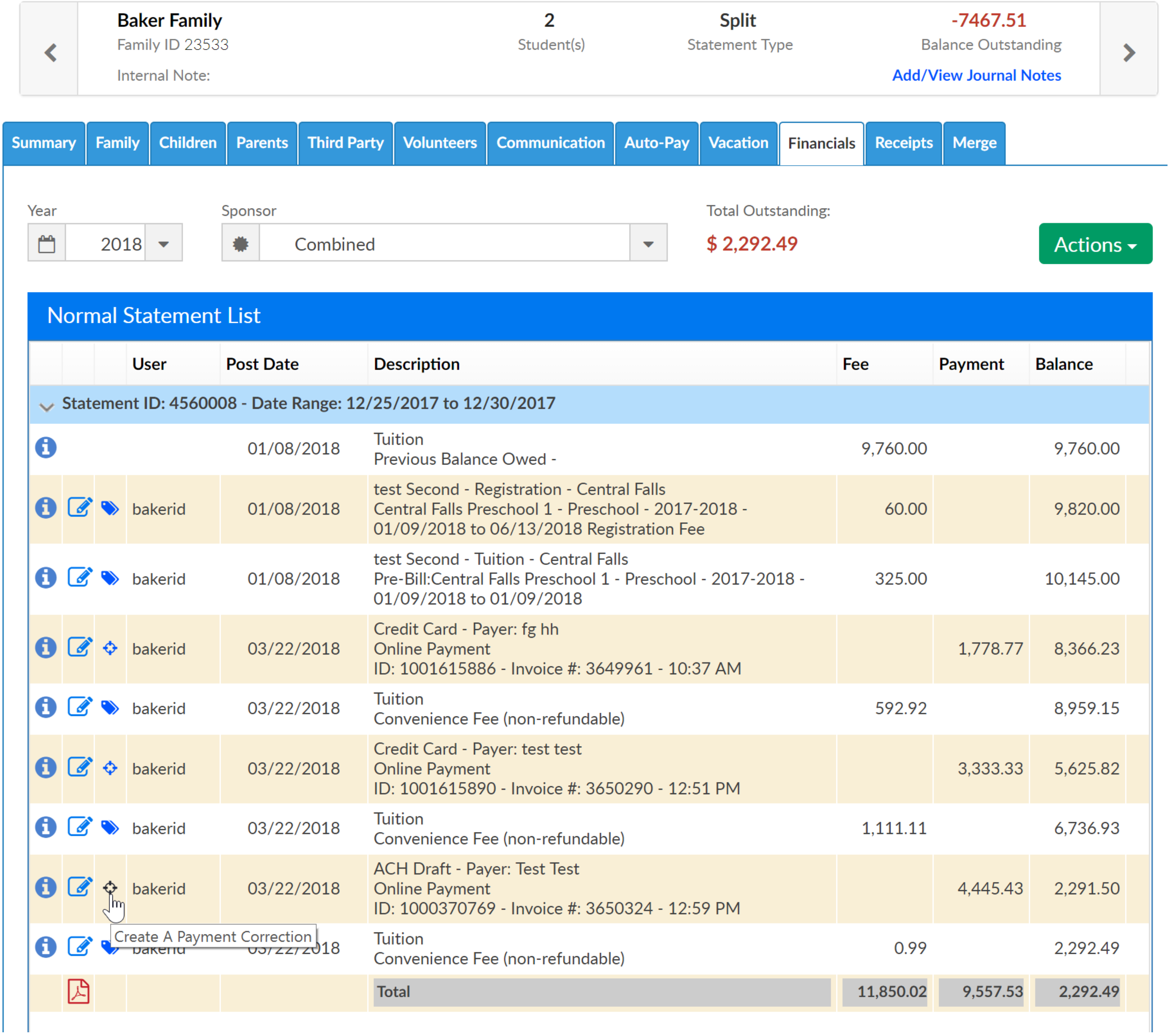
Financial- How do I mark a payment as returned?

Last Modified on 05/22/2018 10:13 am EDT

When a payment is returned by the bank and you would like to take the payment off of the family financial ledger and add a fee, you can mark the payment as a returned payment.

- In order to return a payment you must have a type- payment valid value payment return, short code PYRT setup.
- You must also mark the type-payment as Yes for the Allow Return Payment field on the valid value setup screen.

Go to the family financial ledger and click the payment corrections icon next to the payment line that was returned.



Baker Family
Family ID 23533
Internal Note:

2 Student(s)

Split Statement Type

-7467.51 Balance Outstanding

Add/View Journal Notes

Year: 2018

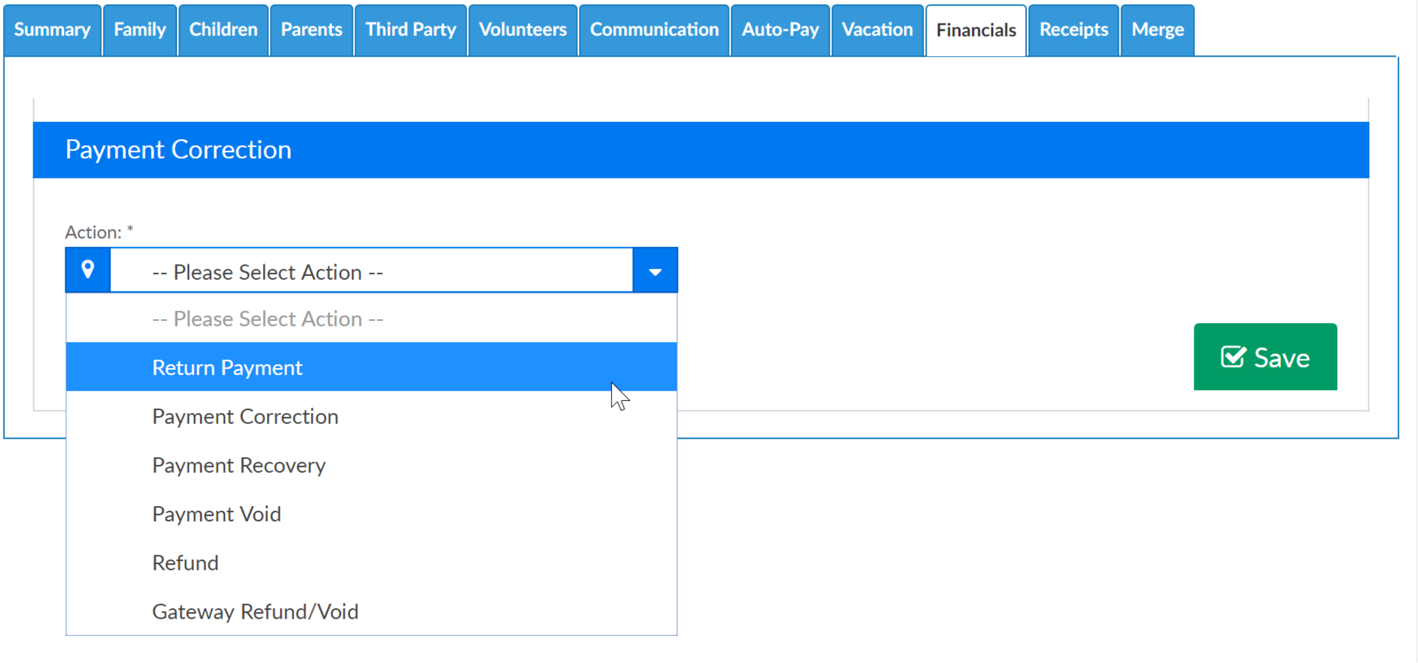
Sponsor: Combined

Total Outstanding: $ 2,292.49

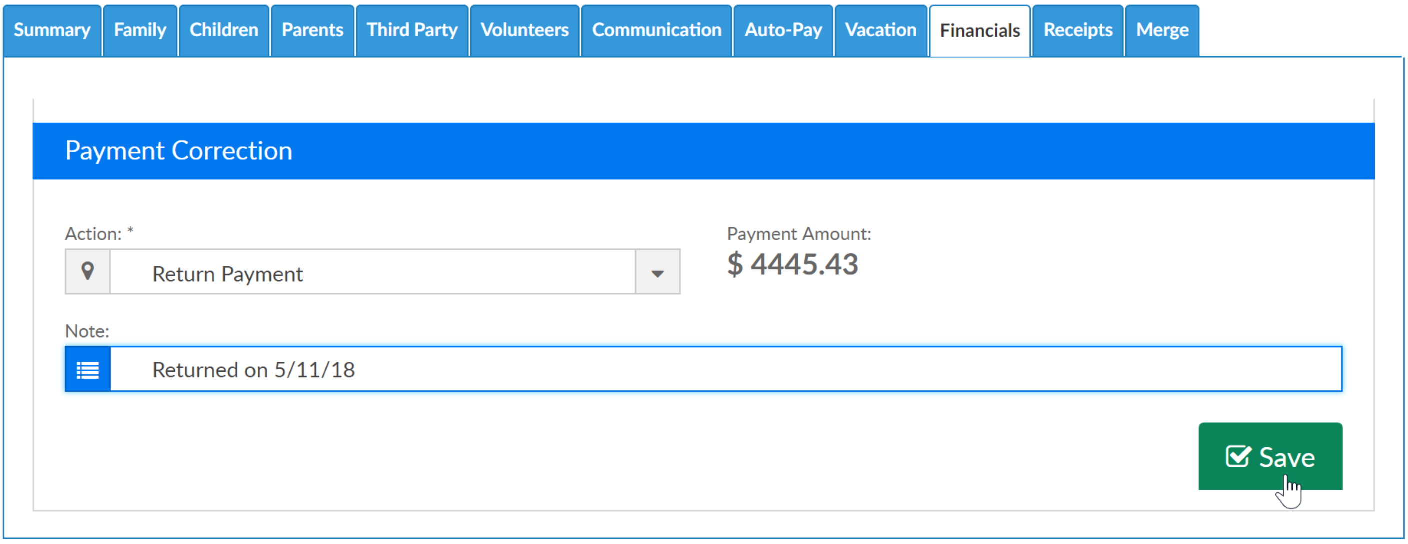
Normal Statement List

User	Post Date	Description	Fee	Payment	Balance
Statement ID: 4560008 - Date Range: 12/25/2017 to 12/30/2017					
	01/08/2018	Tuition Previous Balance Owed -	9,760.00		9,760.00
bakerid	01/08/2018	test Second - Registration - Central Falls Central Falls Preschool 1 - Preschool - 2017-2018 - 01/09/2018 to 06/13/2018 Registration Fee	60.00		9,820.00
bakerid	01/08/2018	test Second - Tuition - Central Falls Pre-Bill:Central Falls Preschool 1 - Preschool - 2017-2018 - 01/09/2018 to 01/09/2018	325.00		10,145.00
bakerid	03/22/2018	Credit Card - Payer: fg hh Online Payment ID: 1001615886 - Invoice #: 3649961 - 10:37 AM		1,778.77	8,366.23
bakerid	03/22/2018	Tuition Convenience Fee (non-refundable)	592.92		8,959.15
bakerid	03/22/2018	Credit Card - Payer: test test Online Payment ID: 1001615890 - Invoice #: 3650290 - 12:51 PM		3,333.33	5,625.82
bakerid	03/22/2018	Tuition Convenience Fee (non-refundable)	1,111.11		6,736.93
bakerid	03/22/2018	ACH Draft - Payer: Test Test Online Payment ID: 1000370769 - Invoice #: 3650324 - 12:59 PM		4,445.43	2,291.50
bakerid	03/22/2018	Tuition Convenience Fee (non-refundable)	0.99		2,292.49
		Total	11,850.02	9,557.53	2,292.49

From the corrections drop down list, select Return Payment-



Enter a note and press save- the note will display on the family ledger and statements.

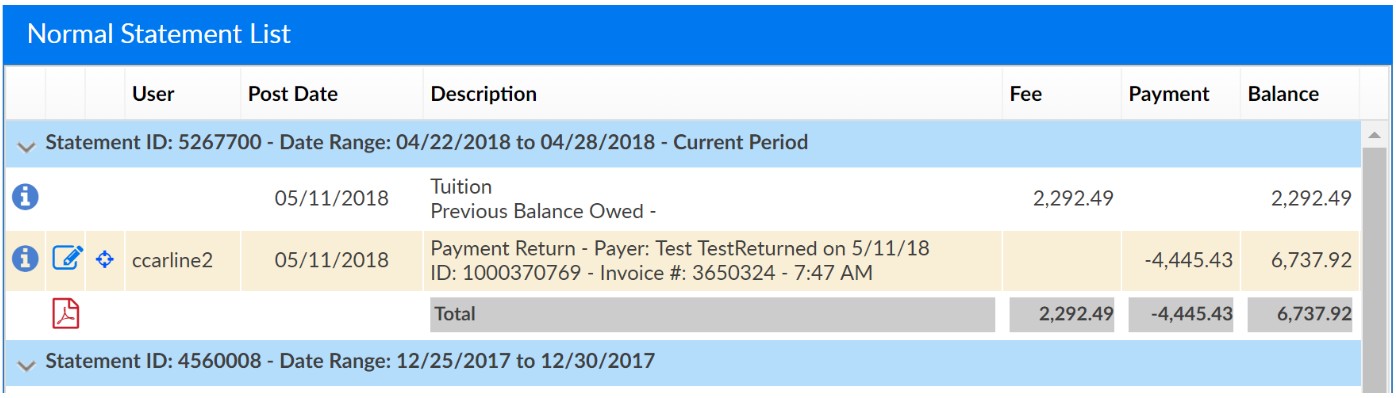


Action: * Return Payment

Payment Amount: $ 4445.43

Note: Returned on 5/11/18

If a returned payment fee has been setup under setup > fees the fee will be added to the ledger and the payment will be marked as negative.



Normal Statement List

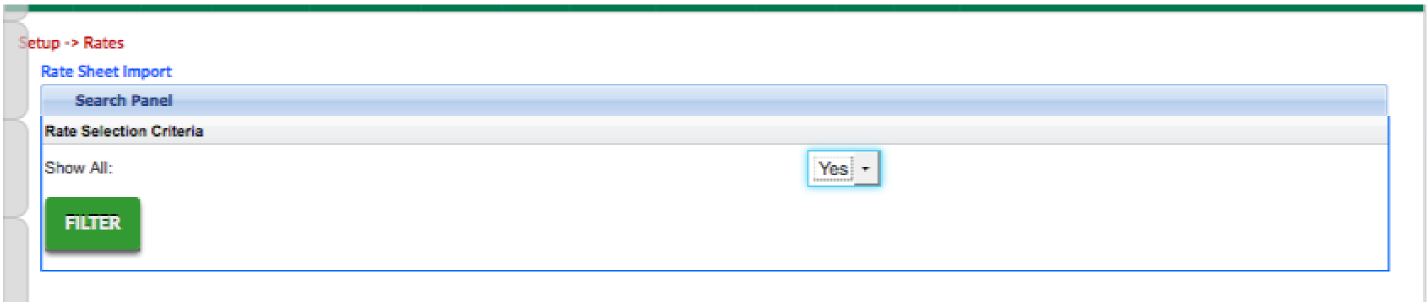
User	Post Date	Description	Fee	Payment	Balance
Statement ID: 5267700 - Date Range: 04/22/2018 to 04/28/2018 - Current Period					
	05/11/2018	Tuition Previous Balance Owed -	2,292.49		2,292.49
ccarline2	05/11/2018	Payment Return - Payer: Test TestReturned on 5/11/18 ID: 1000370769 - Invoice #: 3650324 - 7:47 AM		-4,445.43	6,737.92
		Total	**2,292.49**	**-4,445.43**	**6,737.92**
Statement ID: 4560008 - Date Range: 12/25/2017 to 12/30/2017					

Rates- How do I reactivate a rate?

Last Modified on 06/22/2018 8:17 am EDT

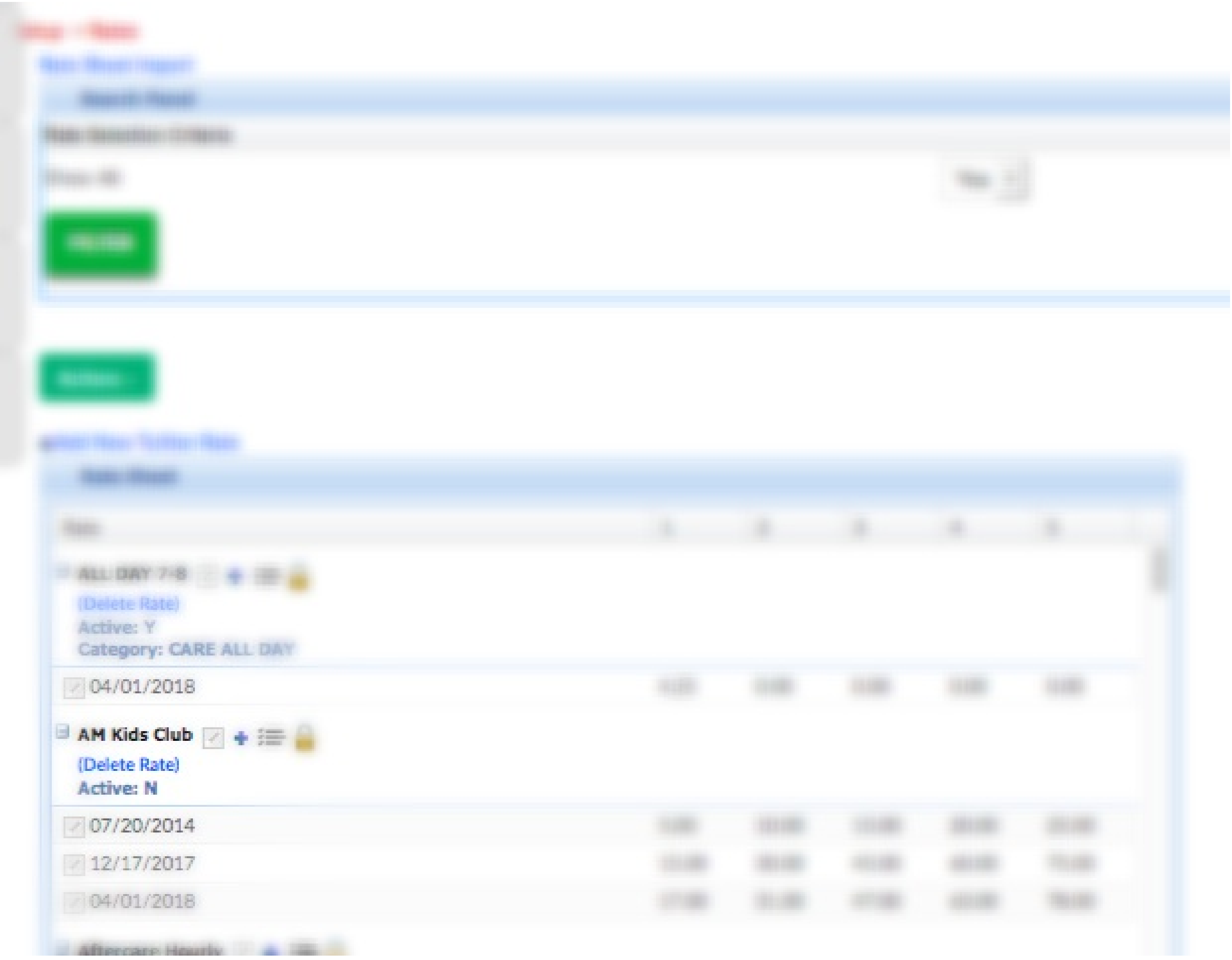
From the Setup menu, select the Rates option.

On the rates screen select yes in the Show All rates drop down, then press filter.



Show All: Yes

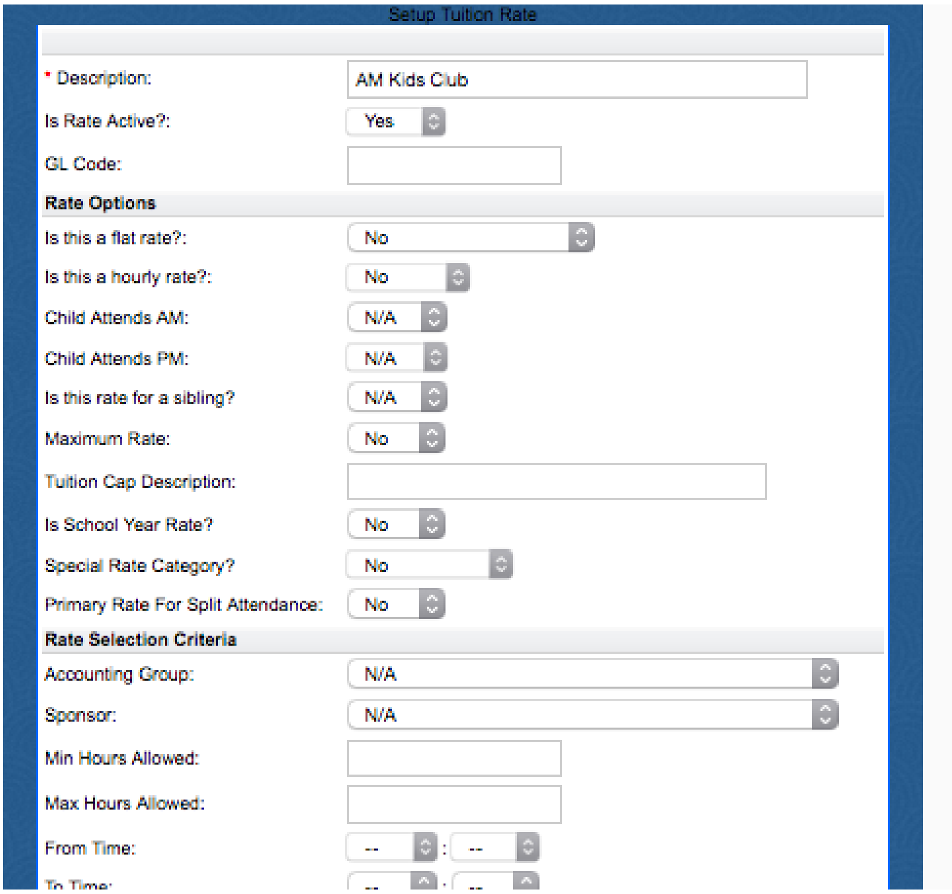
Select the edit icon next to the inactive rate's name. You can see the status of each rate by looking at the active indicator under the rate name.



ALL DAY 7-8
Active: Y
Category: CARE ALL DAY
04/01/2018

AM Kids Club
Active: N
07/20/2014
12/17/2017
04/01/2018

After selecting the edit icon, the rate detail will display. Change the Is This Rate Active field to yes, then scroll to the bottom of the screen and press Save.



Setup Tuition Rate

* Description:	AM Kids Club
Is Rate Active?:	Yes
GL Code:	
Rate Options	
Is this a flat rate?:	No
Is this a hourly rate?:	No
Child Attends AM:	N/A
Child Attends PM:	N/A
Is this rate for a sibling?	N/A
Maximum Rate:	No
Tuition Cap Description:	
Is School Year Rate?	No
Special Rate Category?	No
Primary Rate For Split Attendance:	No
Rate Selection Criteria	
Accounting Group:	N/A
Sponsor:	N/A
Min Hours Allowed:	
Max Hours Allowed:	
From Time:	-- : --
To Time:	-- : --

The rate will now display in rate drop down boxes and will be active again.

Financial- The family does not see a credit card or ACH refund to their account.

Last Modified on 06/26/2018 10:00 pm EDT

If the family does not see a refund posting back to their account and the refund was an ACH or Credit Card, you will need to go to the processor gateway and see if the refund was processed successfully.

If the payment is not showing as refunded through the gateway, the refund can be processed directly from the processor.

You will need to contact your processor to get login details for the site.

- UnityFI- http://www.unityfisolutions.com/contact-us/
- Card Connect- https://cardconnect.com/company/contact
- Authorize.net- https://support.authorize.net/s/

Year End Tax Statements - Review Payment Valid Value Setup

Last Modified on 12/26/2018 10:36 am EST

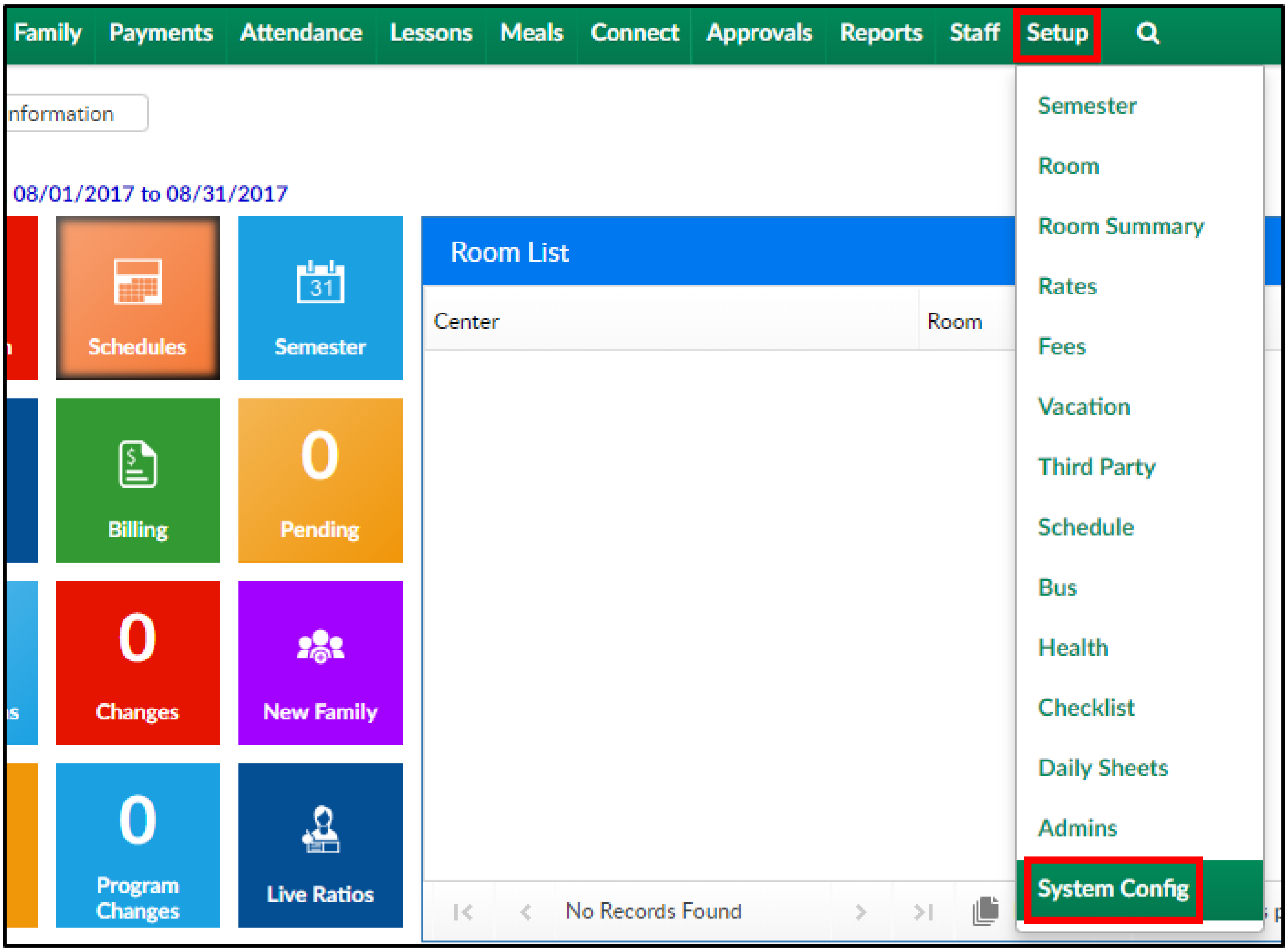
At the start of a new year, most clients will choose to send year end tax statements to families. Tax statements provide a summary of payments made by families for the previous year.

In order to ensure all valid payments have been included, clients should review the setup of their payment type valid values. If the payment type valid value is not set to “Treat As Cash” the payment will not be included on the tax statement.

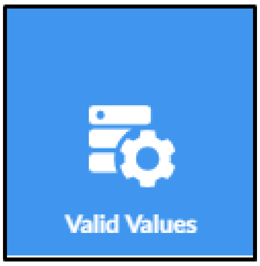
Please Note: Some payment types like Third Party HOD or Scholarships should not be included on parent tax statements as the parent did not actually remit payment and should not claim the sum on their taxes.

Reviewing Payment Type Valid Values

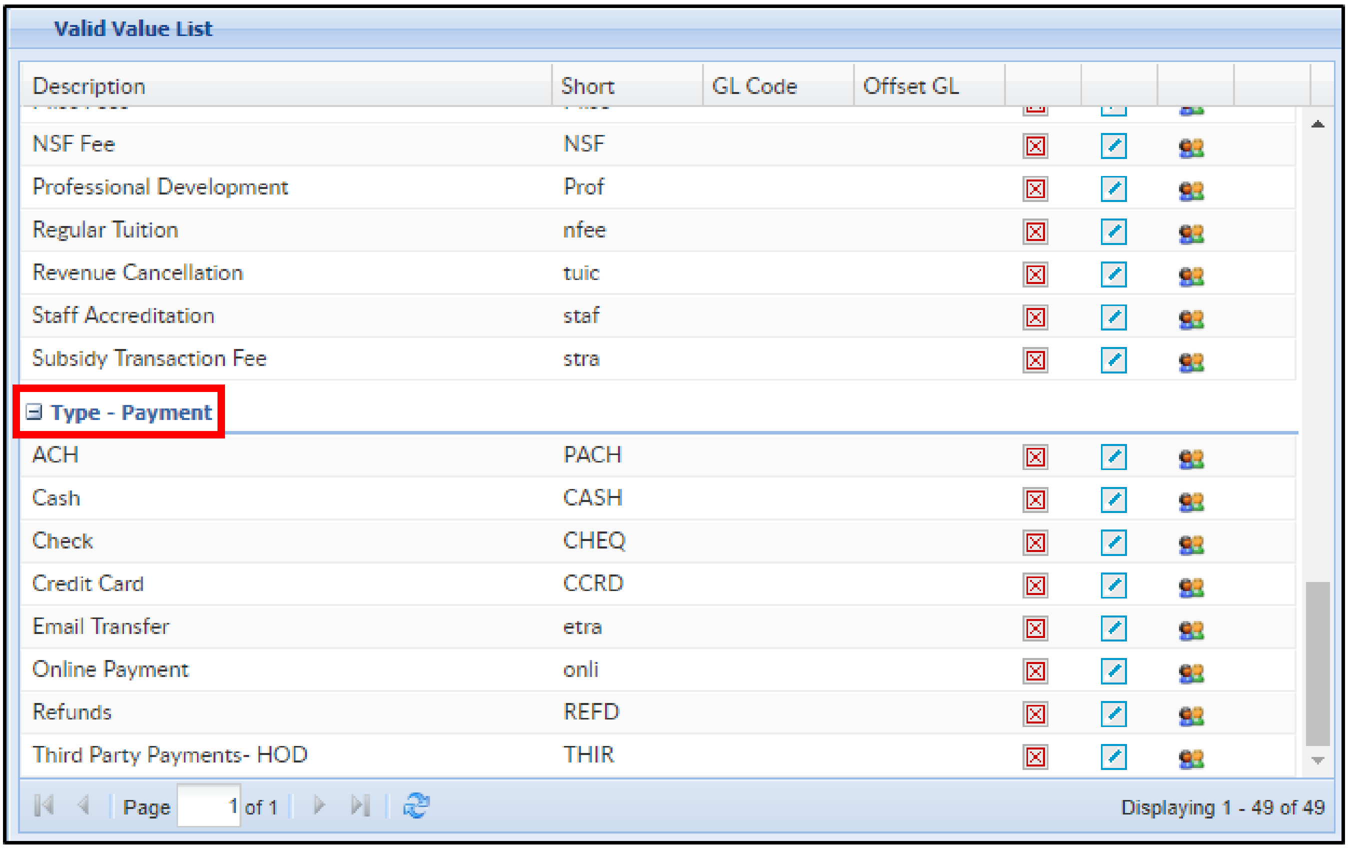
1. Click Setup from the menu, then select System Config



2. Click the Valid Values tile



3. Locate the Type - Payment title within the Valid Value List section



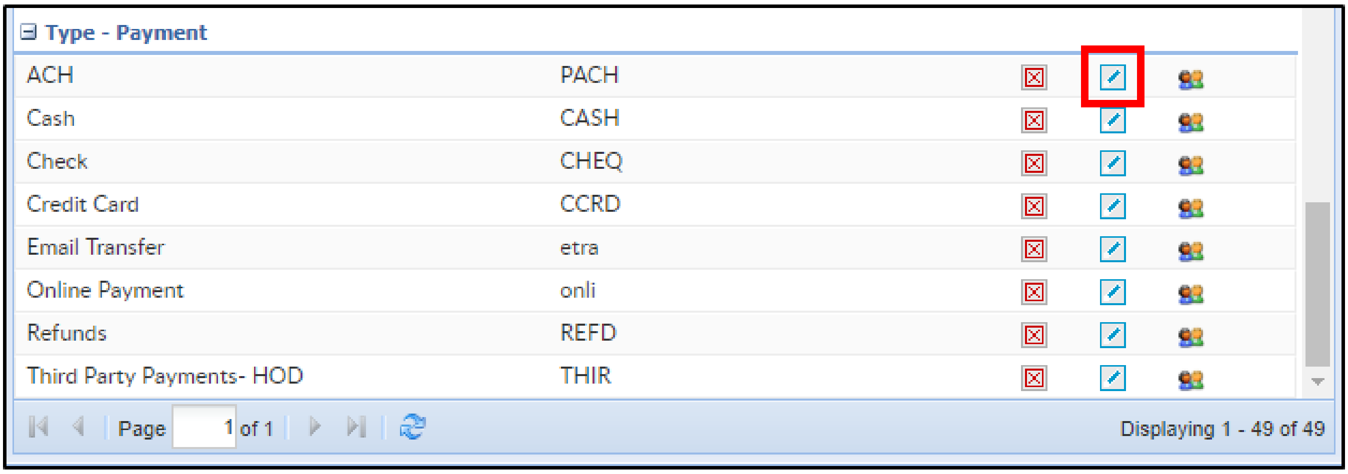
Valid Value List

Description	Short	GL Code	Offset GL
NSF Fee	NSF		
Professional Development	Prof		
Regular Tuition	nfee		
Revenue Cancellation	tuic		
Staff Accreditation	staf		
Subsidy Transaction Fee	stra		
Type - Payment			
ACH	PACH		
Cash	CASH		
Check	CHEQ		
Credit Card	CCRD		
Email Transfer	etra		
Online Payment	onli		
Refunds	REFD		
Third Party Payments- HOD	THIR		

Page 1 of 1

Displaying 1 - 49 of 49

4. Click the edit icon to view the payment type setup



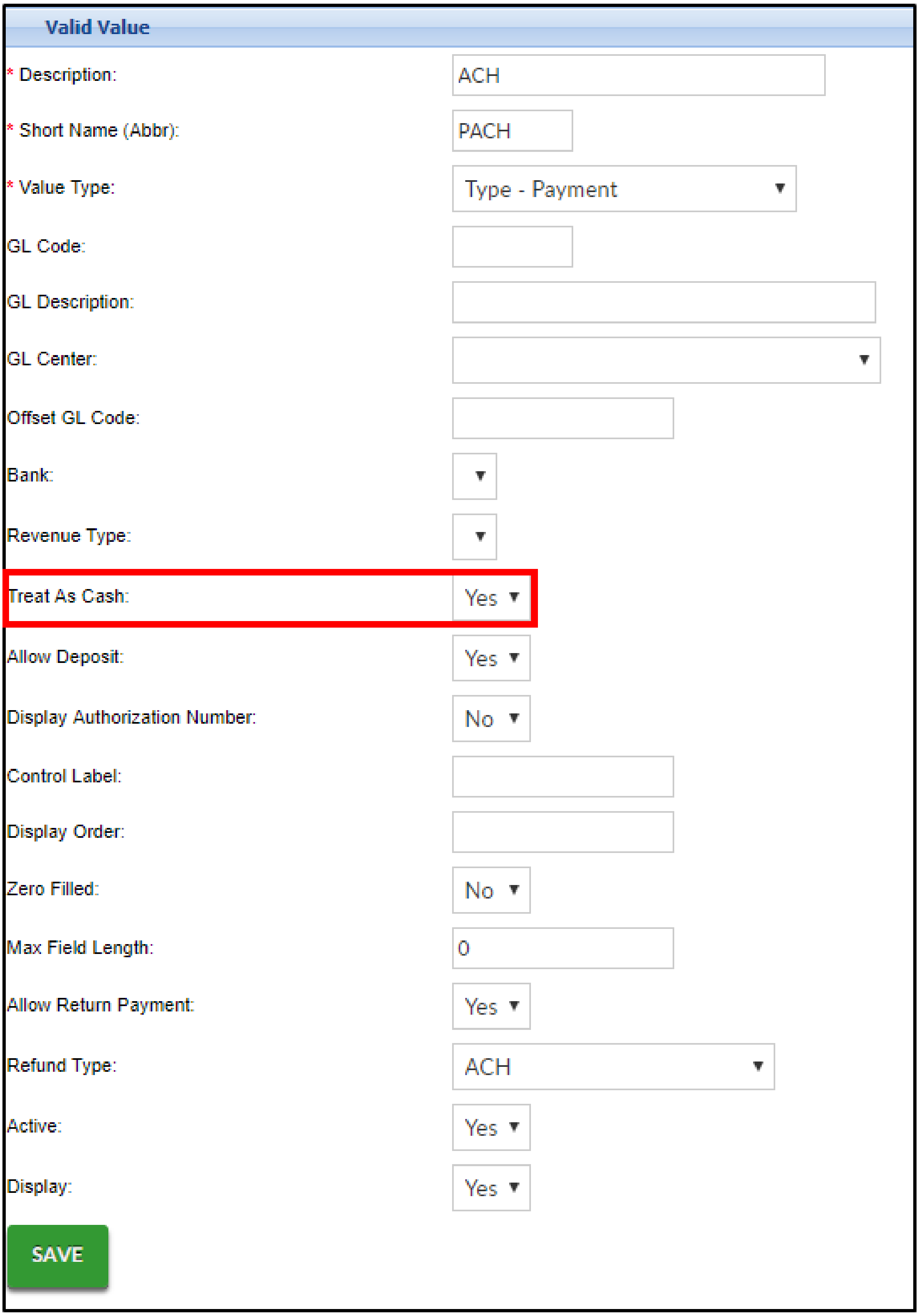
Type - Payment

ACH	PACH
Cash	CASH
Check	CHEQ
Credit Card	CCRD
Email Transfer	etra
Online Payment	onli
Refunds	REFD
Third Party Payments- HOD	THIR

Page 1 of 1

Displaying 1 - 49 of 49

5. The setup of the payment type will display in the Valid Value section. Verify Treat As Cash is set to Yes if payments <u>should</u> display on the parent's year-end tax summary



* Description:	ACH
* Short Name (Abbr):	PACH
* Value Type:	Type - Payment
GL Code:	
GL Description:	
GL Center:	
Offset GL Code:	
Bank:	
Revenue Type:	
Treat As Cash:	Yes
Allow Deposit:	Yes
Display Authorization Number:	No
Control Label:	
Display Order:	
Zero Filled:	No
Max Field Length:	0
Allow Return Payment:	Yes
Refund Type:	ACH
Active:	Yes
Display:	Yes

6. Click Save

Distributing Tax Statements

There are multiple ways to distribute tax statements to parents, click the links below for instructions.

Print tax statements

Send tax statements by email

Self service via Parent Portal

Year End Tax Statements - Sending Tax Statements By Email

Last Modified on 12/26/2018 10:36 am EST

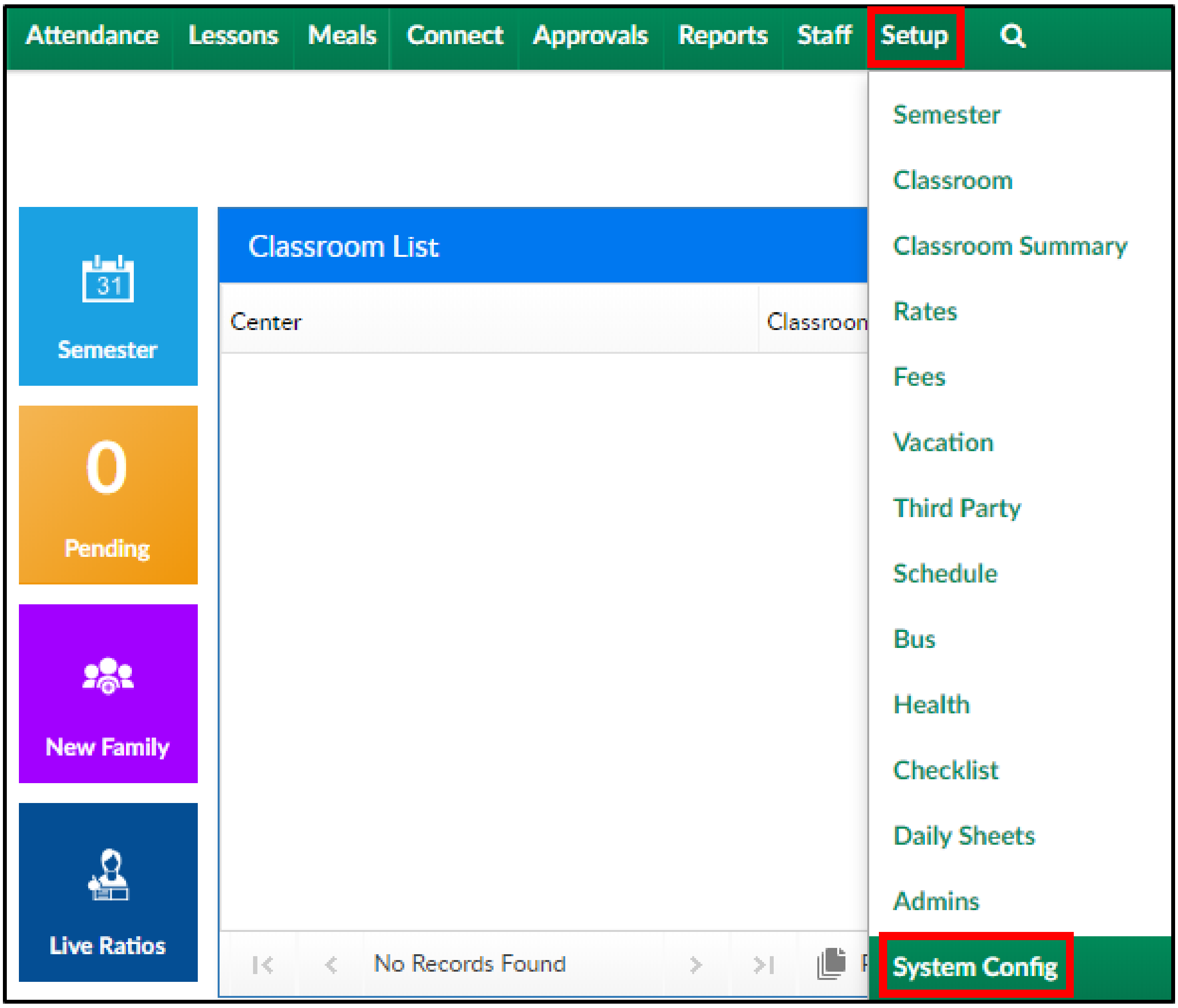
At the start of the new year most clients will choose to send year end tax statements to their families. Tax statements provide a summary of payments made by families. Ensure the payment type valid values are setup correctly.

Administrators can print tax statements or send tax statements to parents through the system via email. Please follow the steps below to email tax statements.

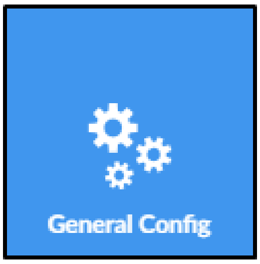
Review Tax ID

Before running tax, statements make sure the tax ID is correct. This can be done by following the steps below:

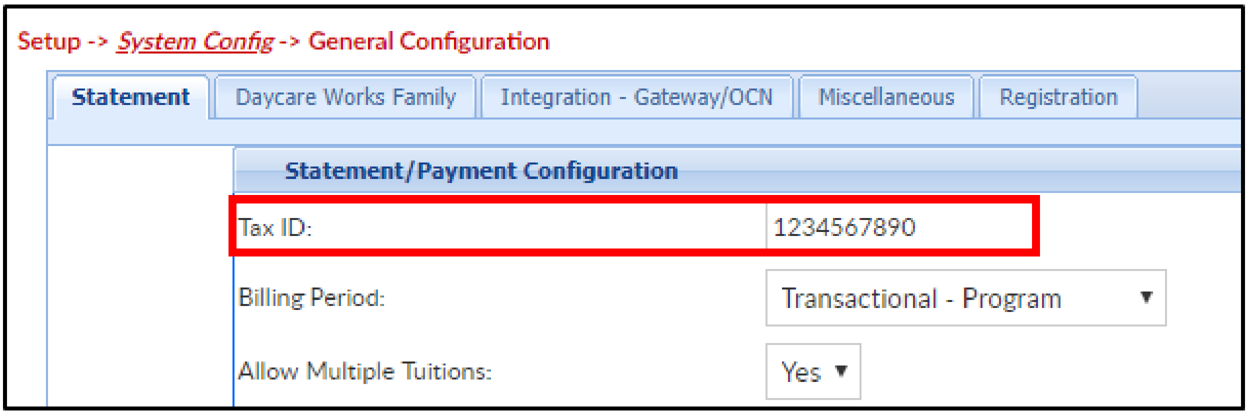
1. From the Setup menu, select System Config



2. Then click the General Config tile



3. The Tax ID will be listed in the first field under the Statement tab



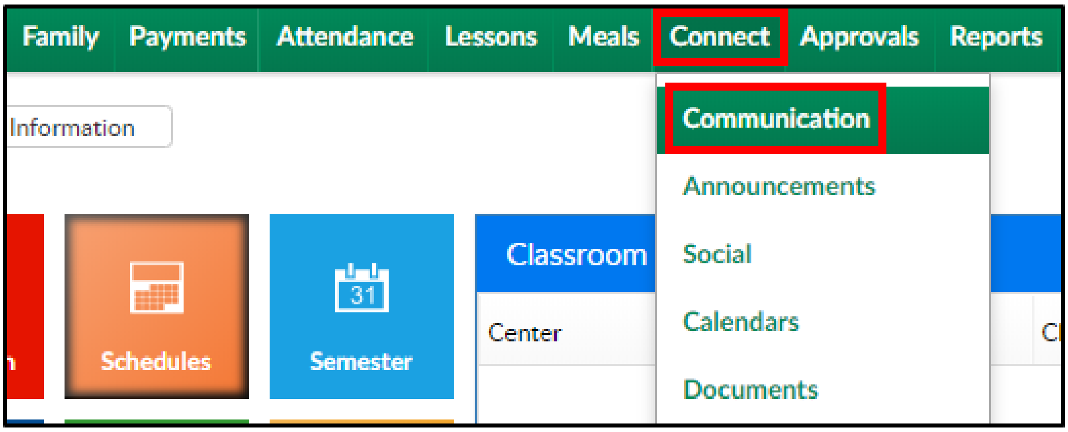
Tax ID: 1234567890

Billing Period: Transactional - Program

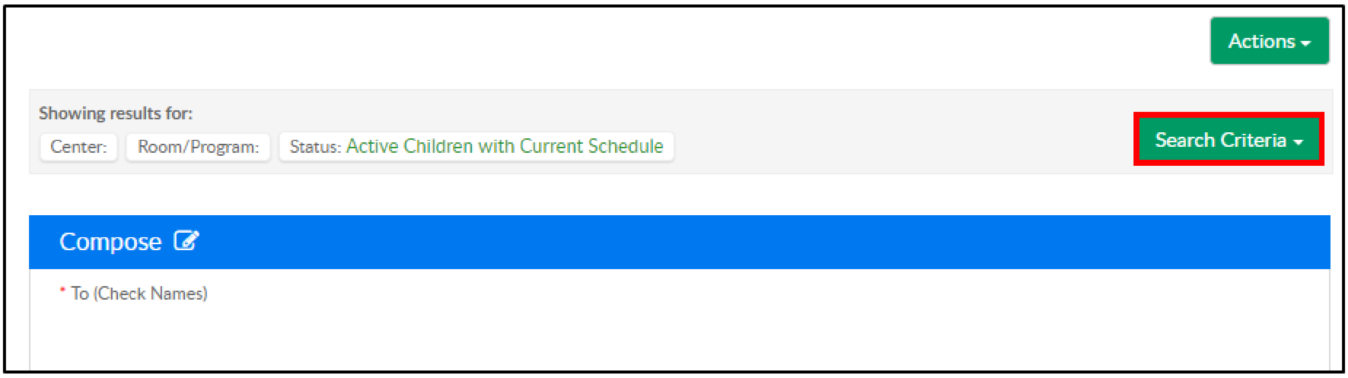
Allow Multiple Tuitions: Yes

Sending Tax Statements by Email

1. Click Connect from the menu, then select Communication



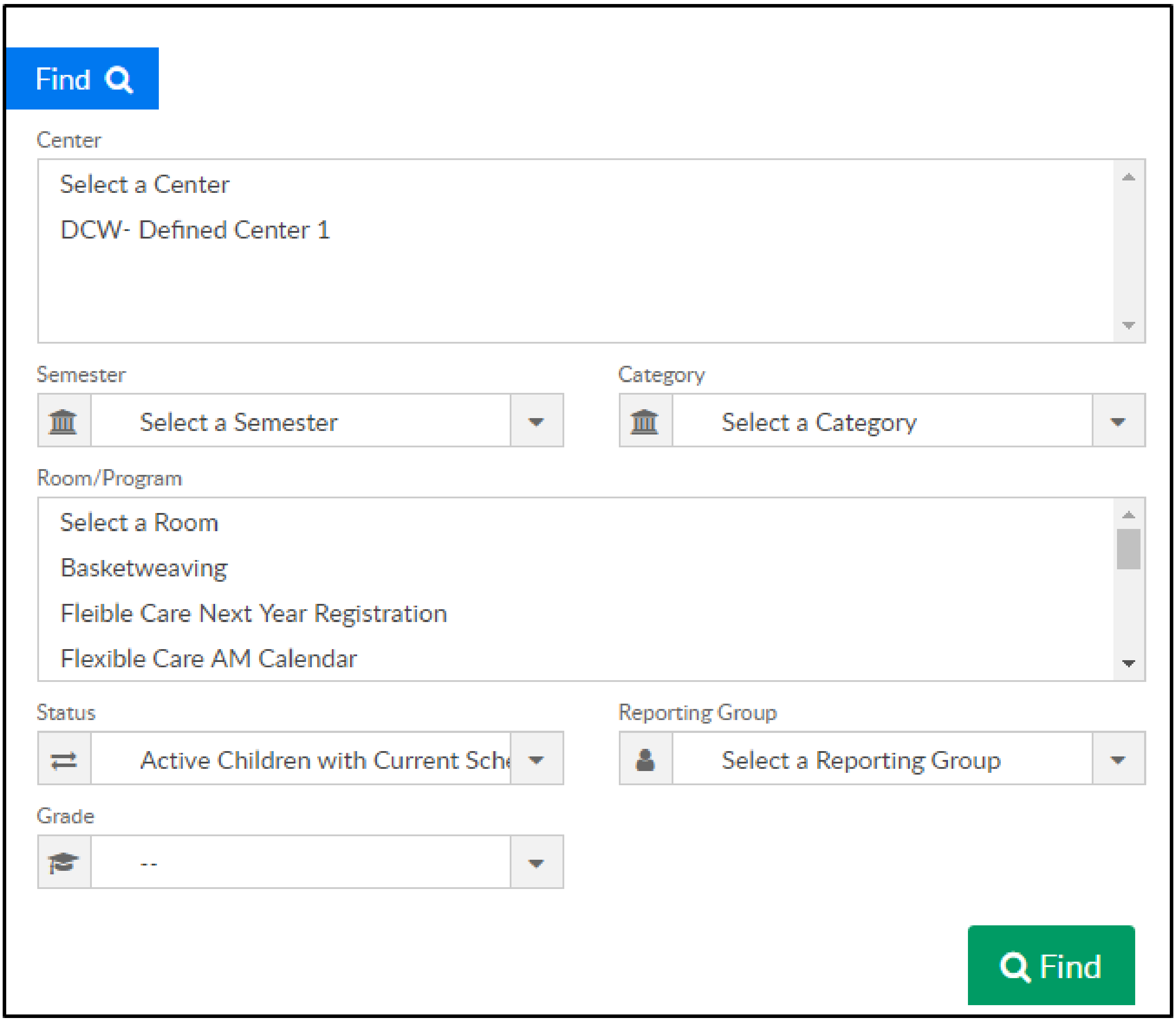
2. Click the Search Criteria button



Showing results for:
Center: | Room/Program: | Status: Active Children with Current Schedule

* To (Check Names)

3. Select any search criteria (Center, Semester, Status, Grade, etc.)



Center
Select a Center
DCW- Defined Center 1

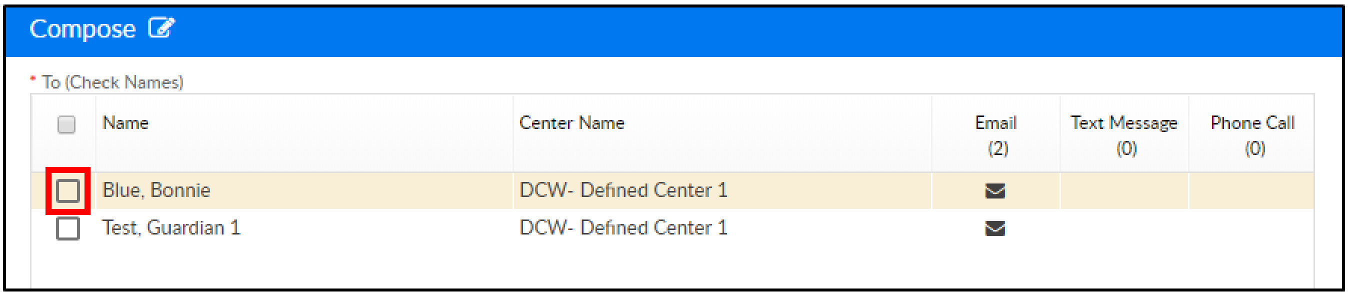
Semester: Select a Semester
Category: Select a Category

Room/Program
Select a Room
Basketweaving
Fleible Care Next Year Registration
Flexible Care AM Calendar

Status: Active Children with Current Sch
Reporting Group: Select a Reporting Group

Grade: --

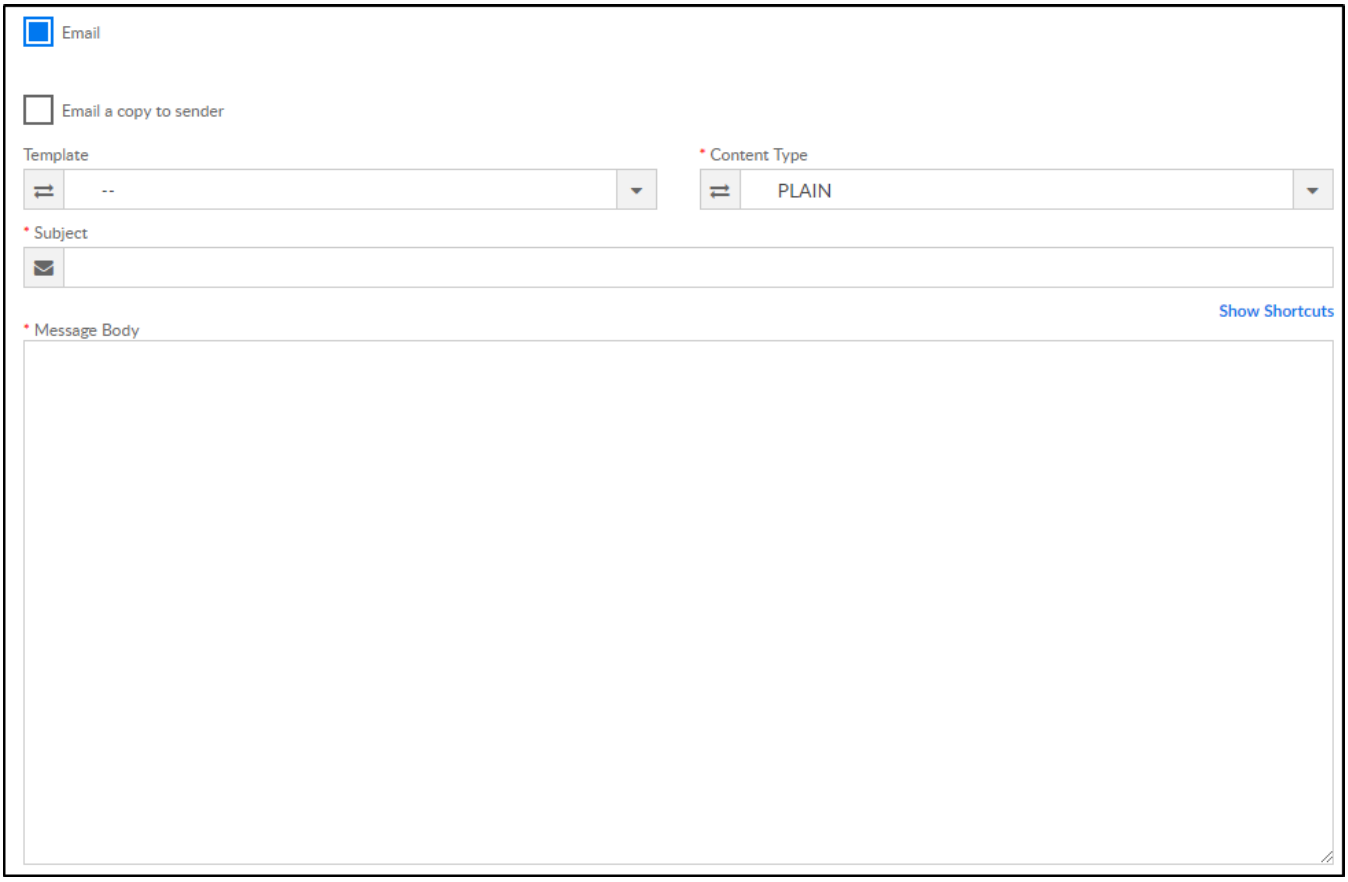
4. Select each parent by clicking the box to the left of the parent's name



* To (Check Names)

☐	Name	Center Name	Email (2)	Text Message (0)	Phone Call (0)
☐	Blue, Bonnie	DCW- Defined Center 1	✉		
☐	Test, Guardian 1	DCW- Defined Center 1	✉		

5. Complete the following section



☑ Email

☐ Email a copy to sender

Template: --

* Content Type: PLAIN

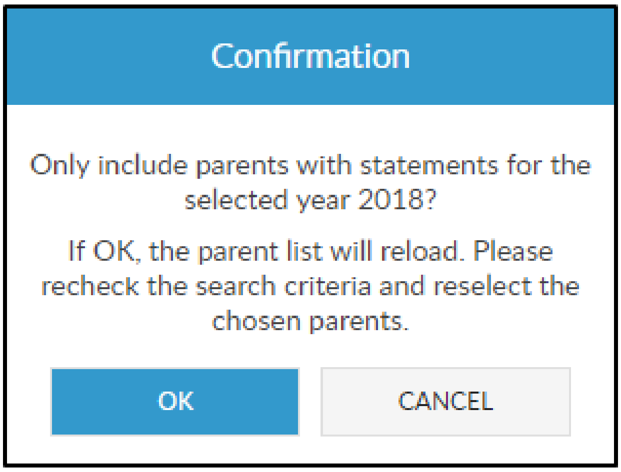
* Subject

Show Shortcuts

* Message Body

   - Email a copy to sender - select this option if a copy of the email communication should be emailed to the sender of the email. The system will use the email address of the user logged into the system
   - Template - select a template from the drop-down menu or leave blank to type a custom message. Templates can be setup here
   - Content Type
      - HTML - use this option if sending links or using special formatting
      - PLAIN - use this option if only text should be included in the body of the message
   - Subject - enter a subject line for the email
   - Message Body - enter the text of the message in this field

6. Attachment for Email
   - Attach Year End Tax - check this option to attach the year end statement. After selecting this option, the following message will appear

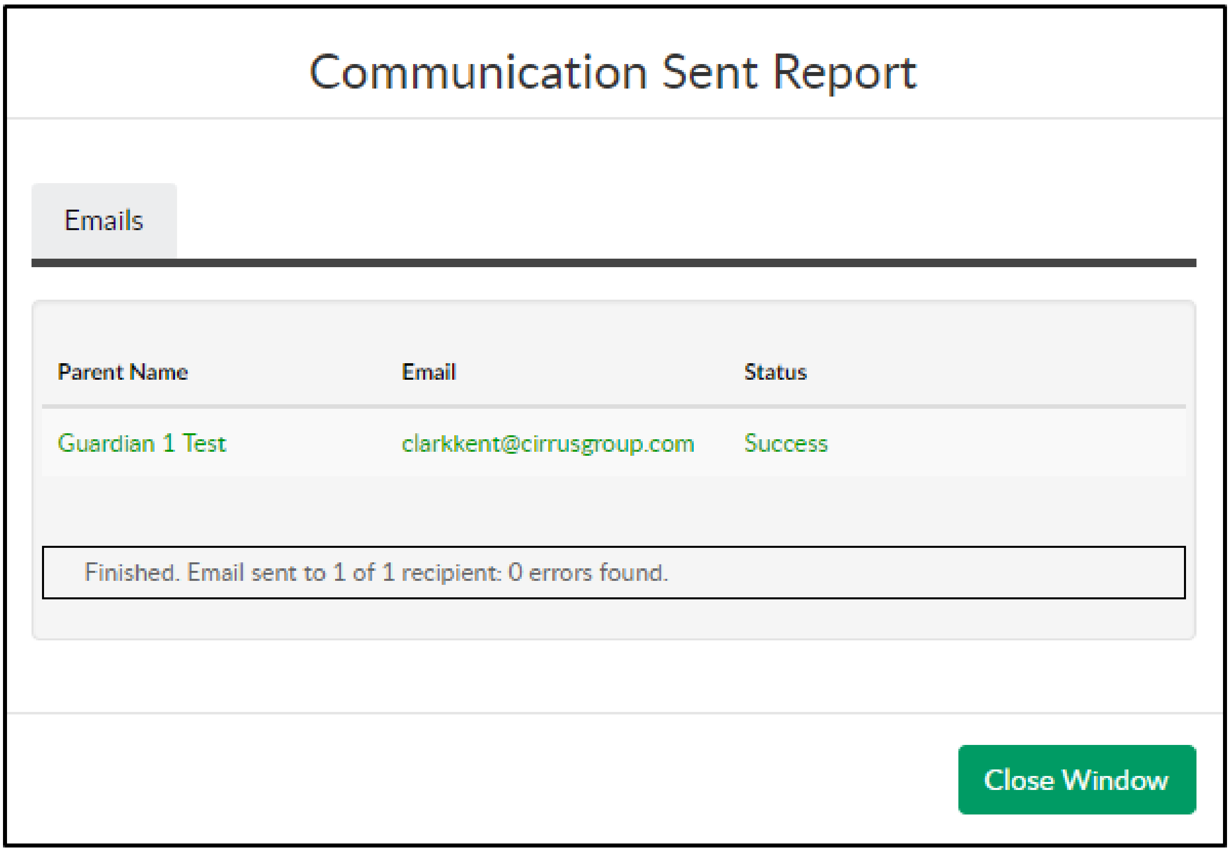


Only include parents with statements for the selected year 2018?

If OK, the parent list will reload. Please recheck the search criteria and reselect the chosen parents.

        - OK - the list of parents will reload above and options will have to be re-selected
        - CANCEL - use this option if only the originally selected parents should receive the email
    - Tax Year - select the year
    - Choose File - click this button if another file needs to be attached

7. Click Send
8. A popup will appear confirming the email message(s) has been sent. If there were any errors sending the message, they will appear in this window

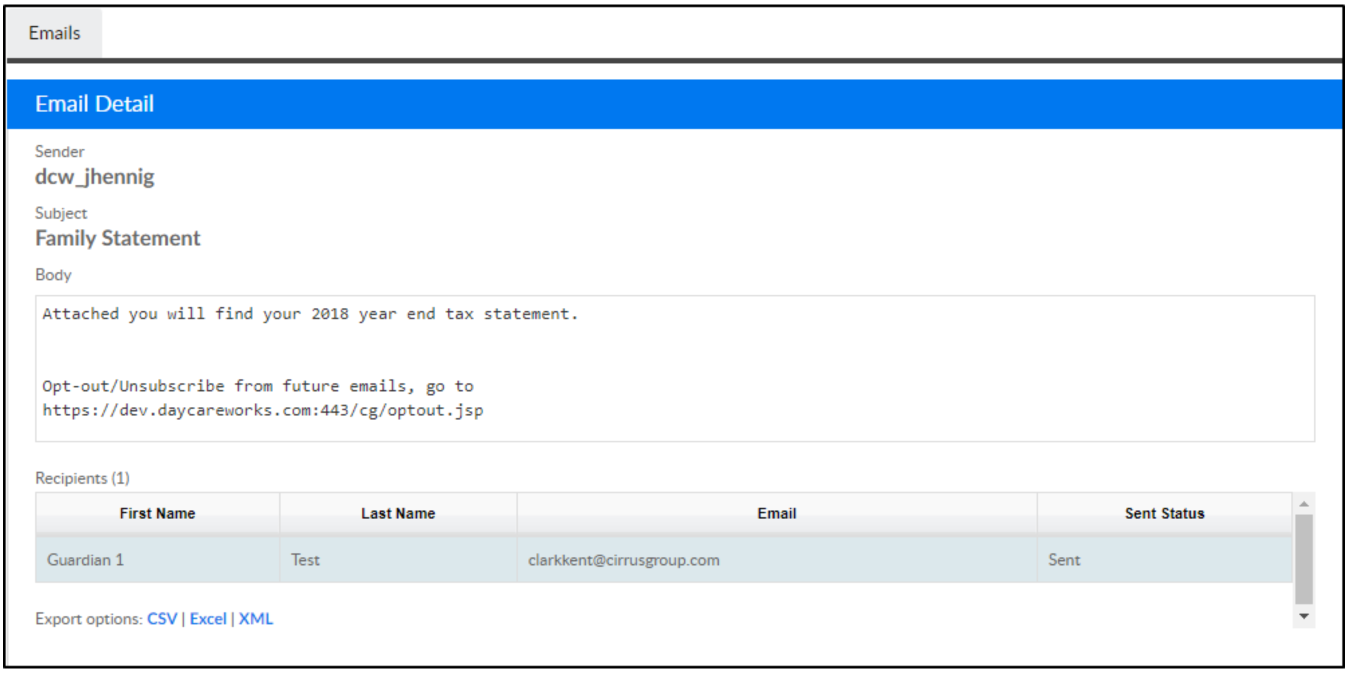


Parent Name	Email	Status
Guardian 1 Test	clarkkent@cirrusgroup.com	Success

Finished. Email sent to 1 of 1 recipient: 0 errors found.

9. Click Close Window

10. An Email Detail screen will display a summary of the email and a list of recipients



Email Detail

Sender

dcw_jhennig

Subject

Family Statement

Body

```
Attached you will find your 2018 year end tax statement.


Opt-out/Unsubscribe from future emails, go to
https://dev.daycareworks.com:443/cg/optout.jsp
```

Recipients (1)

First Name	Last Name	Email	Sent Status
Guardian 1	Test	clarkkent@cirrusgroup.com	Sent

Export options: CSV | Excel | XML

Year End Tax Statements - Printing Tax Statements

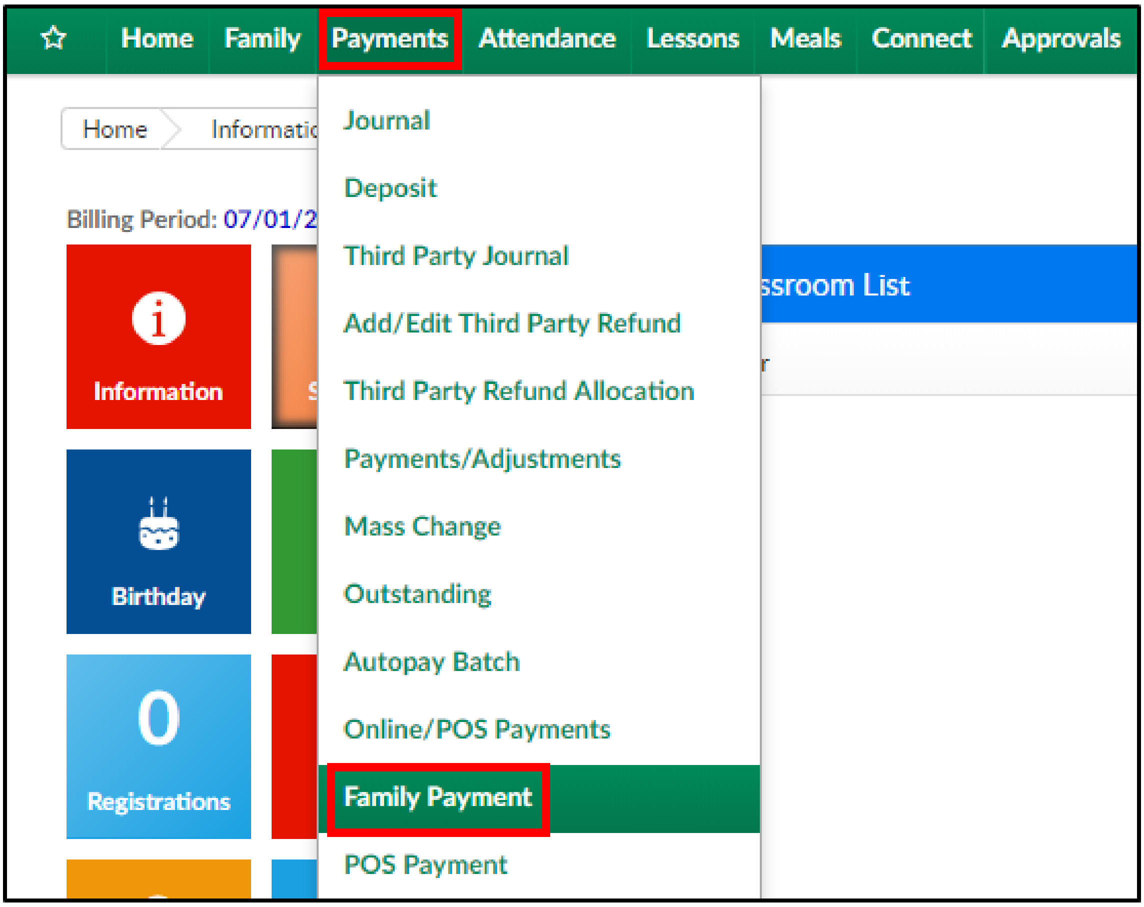
Last Modified on 12/26/2018 10:35 am EST

At the start of the new year most clients will choose to send year end tax statements to their families. Tax statements provide a summary of payments made by families. Ensure the payment type valid values are setup correctly.

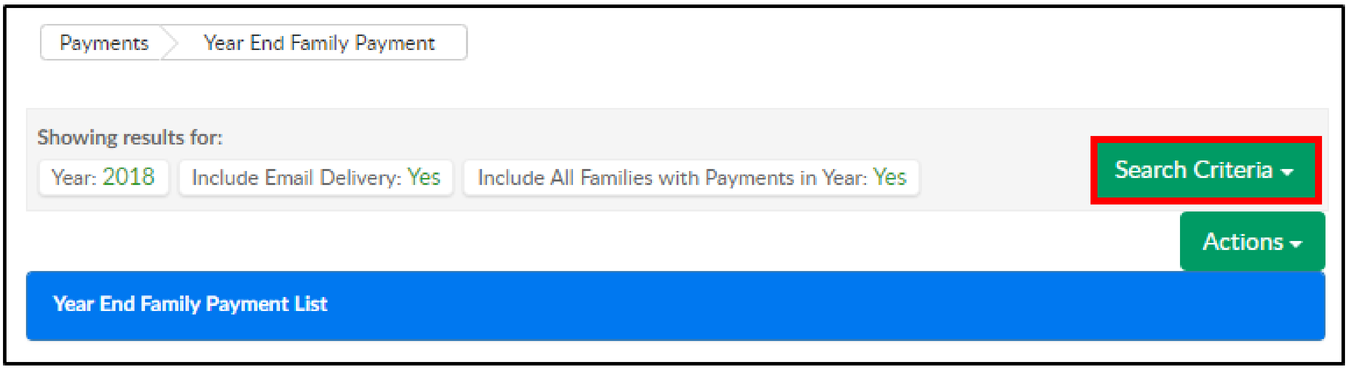
Administrators can print tax statements or send tax statements to parents through the system via email. Please follow the steps below to print tax statements.
Please Note: This can only be done for one center at a time, it does not work for the business level.

Printing Tax Statements - PDF

1. From the Payments menu, click Family Payment

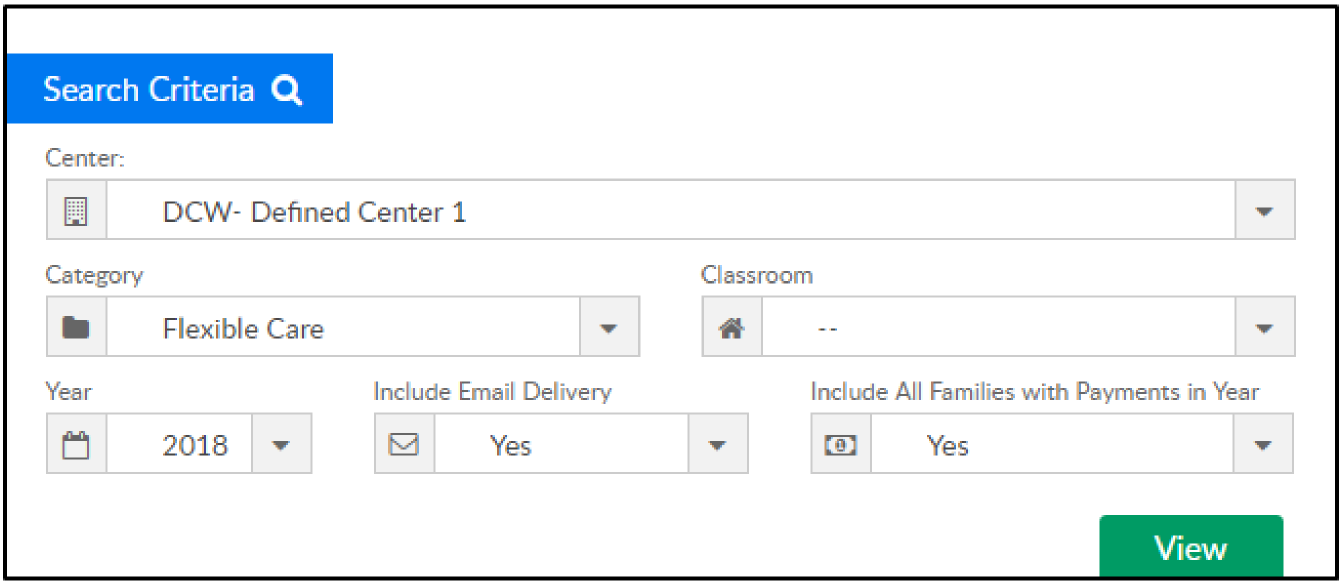


2. Click the Search Criteria button



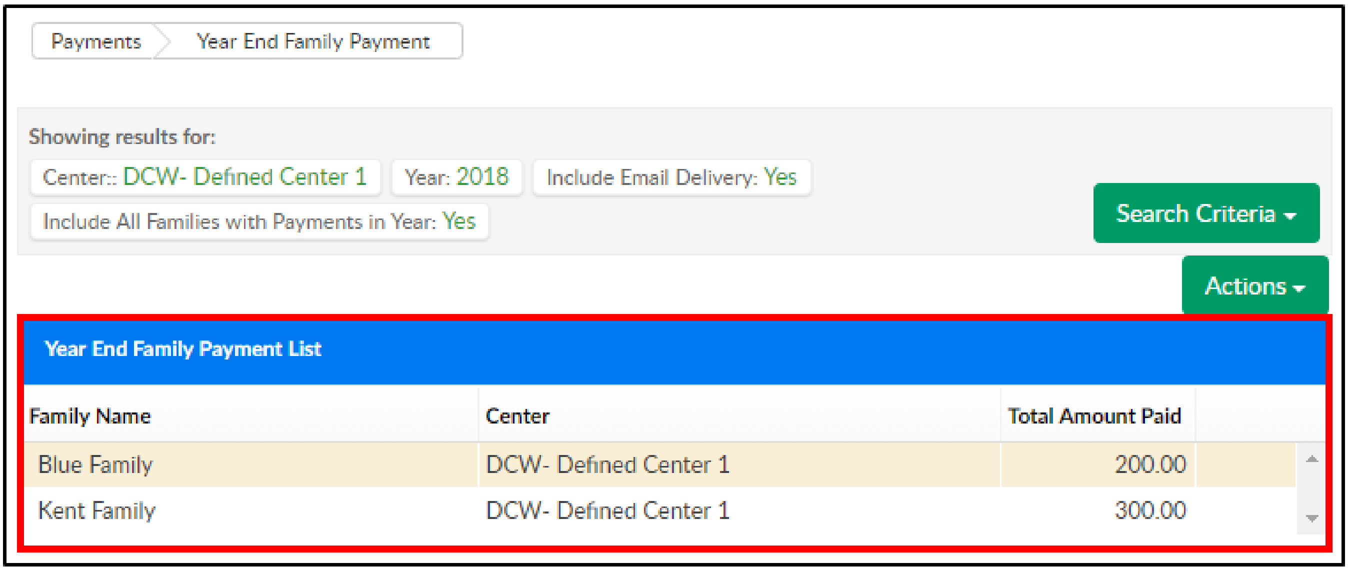
Showing results for:
Year: 2018
Include Email Delivery: Yes
Include All Families with Payments in Year: Yes

3. Complete the Search Criteria fields



Center: DCW- Defined Center 1
Category: Flexible Care
Classroom: --
Year: 2018
Include Email Delivery: Yes
Include All Families with Payments in Year: Yes

   - Center - select the center from the drop-down. Selecting the Business Level will not populate information
   - Category - choose a category, if applicable
   - Classroom - choose a classroom, if applicable
   - Year - select the year to view
   - Include Email Delivery - Recommended Setting: Yes
   - Include All Families with Payments in Year - Recommended Setting: Yes
4. Click View
5. Results will display in the Year End Family Payment List section

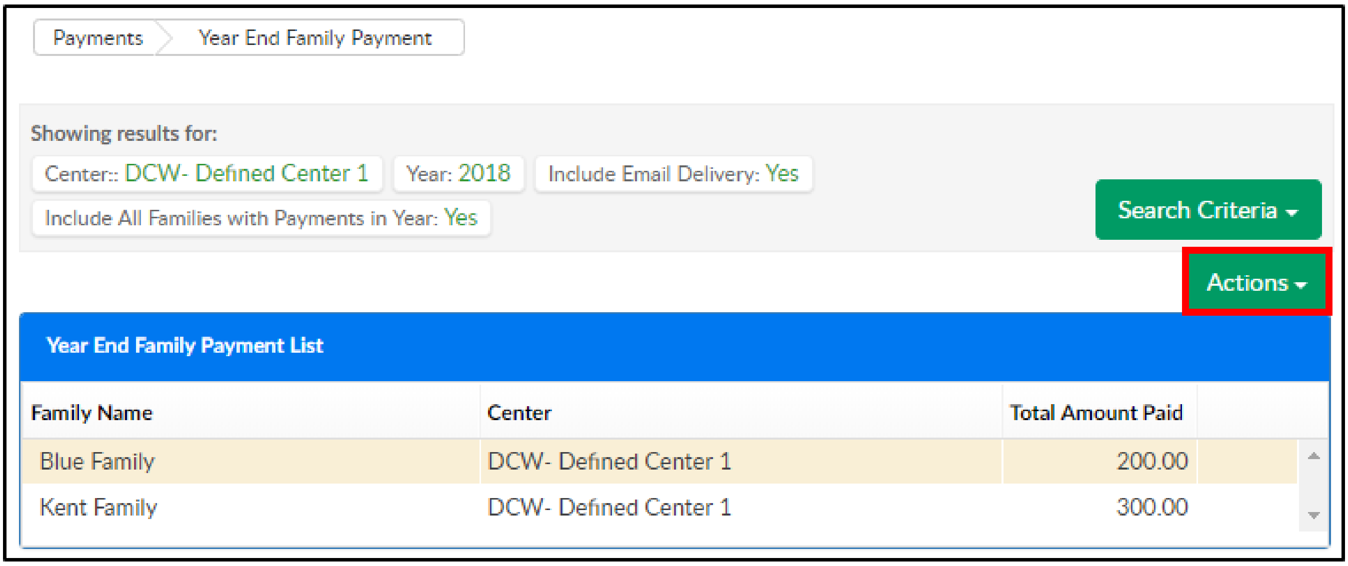


Showing results for:
Center:: DCW- Defined Center 1
Year: 2018
Include Email Delivery: Yes
Include All Families with Payments in Year: Yes

Year End Family Payment List

Family Name	Center	Total Amount Paid
Blue Family	DCW- Defined Center 1	200.00
Kent Family	DCW- Defined Center 1	300.00

6. To print statements, click the Actions menu

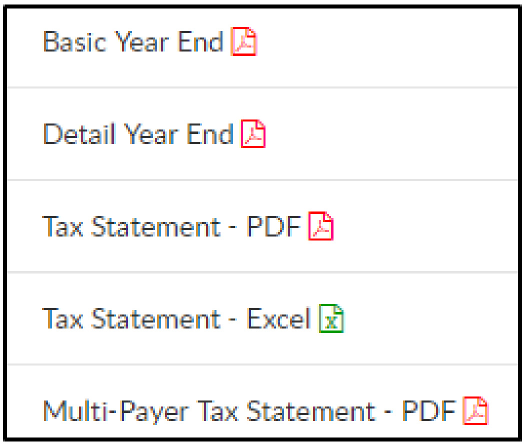


Showing results for:
Center:: DCW- Defined Center 1
Year: 2018
Include Email Delivery: Yes
Include All Families with Payments in Year: Yes

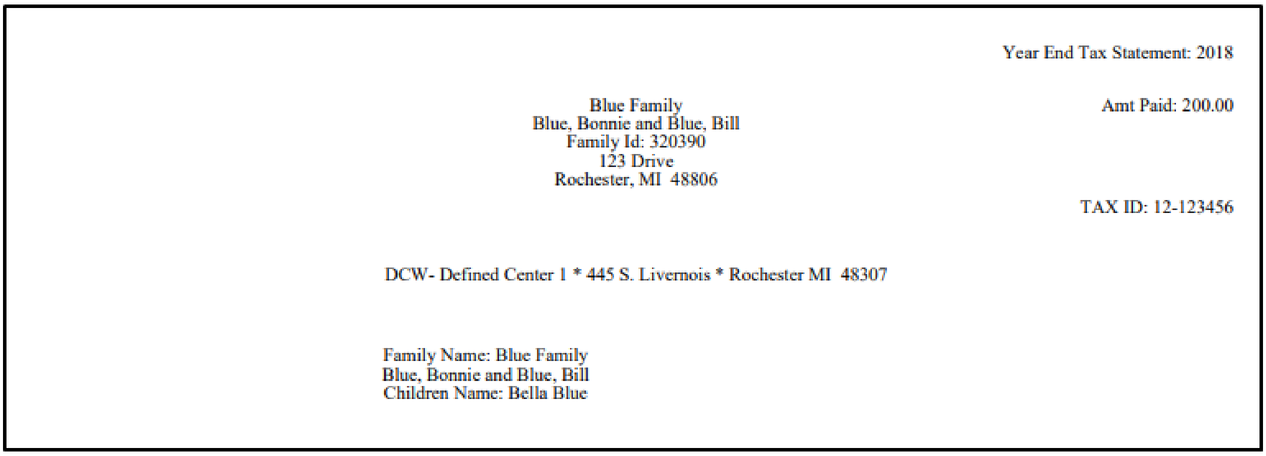
Year End Family Payment List

Family Name	Center	Total Amount Paid
Blue Family	DCW- Defined Center 1	200.00
Kent Family	DCW- Defined Center 1	300.00

7. Select one of the reporting options



- Basic Year End - displays the paid balance in a sum



Year End Tax Statement: 2018

Amt Paid: 200.00

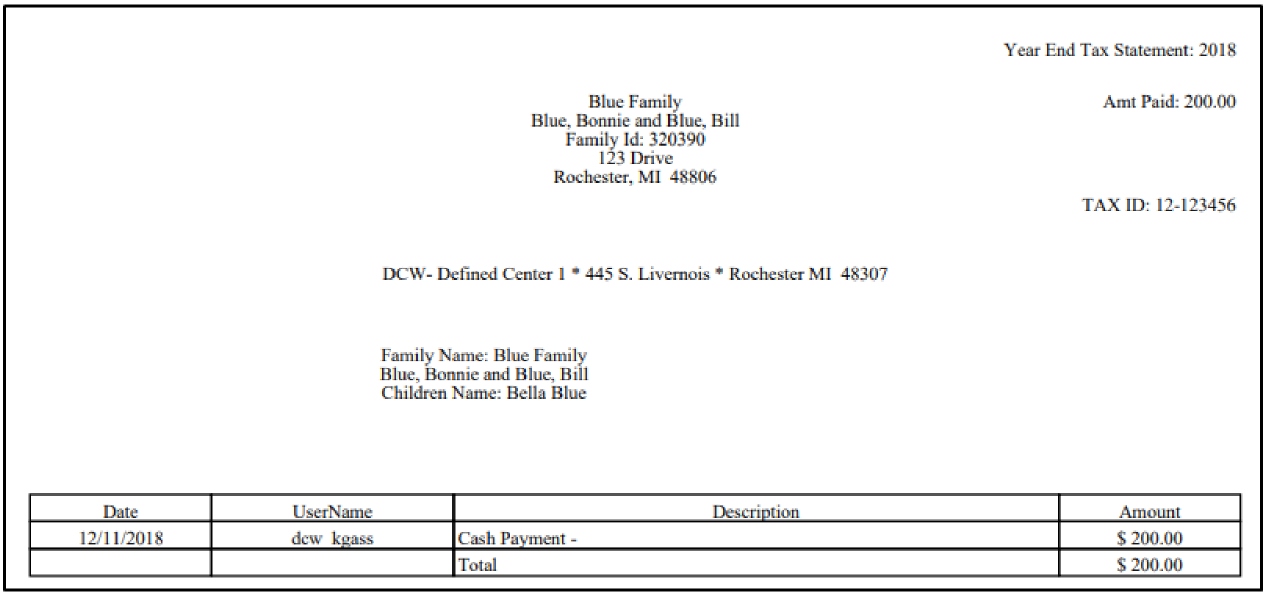
Blue Family
Blue, Bonnie and Blue, Bill
Family Id: 320390
123 Drive
Rochester, MI 48806

TAX ID: 12-123456

DCW- Defined Center 1 * 445 S. Livernois * Rochester MI 48307

Family Name: Blue Family
Blue, Bonnie and Blue, Bill
Children Name: Bella Blue

- Detail Year End - displays details of the paid balance



Year End Tax Statement: 2018

Amt Paid: 200.00

Blue Family
Blue, Bonnie and Blue, Bill
Family Id: 320390
123 Drive
Rochester, MI 48806

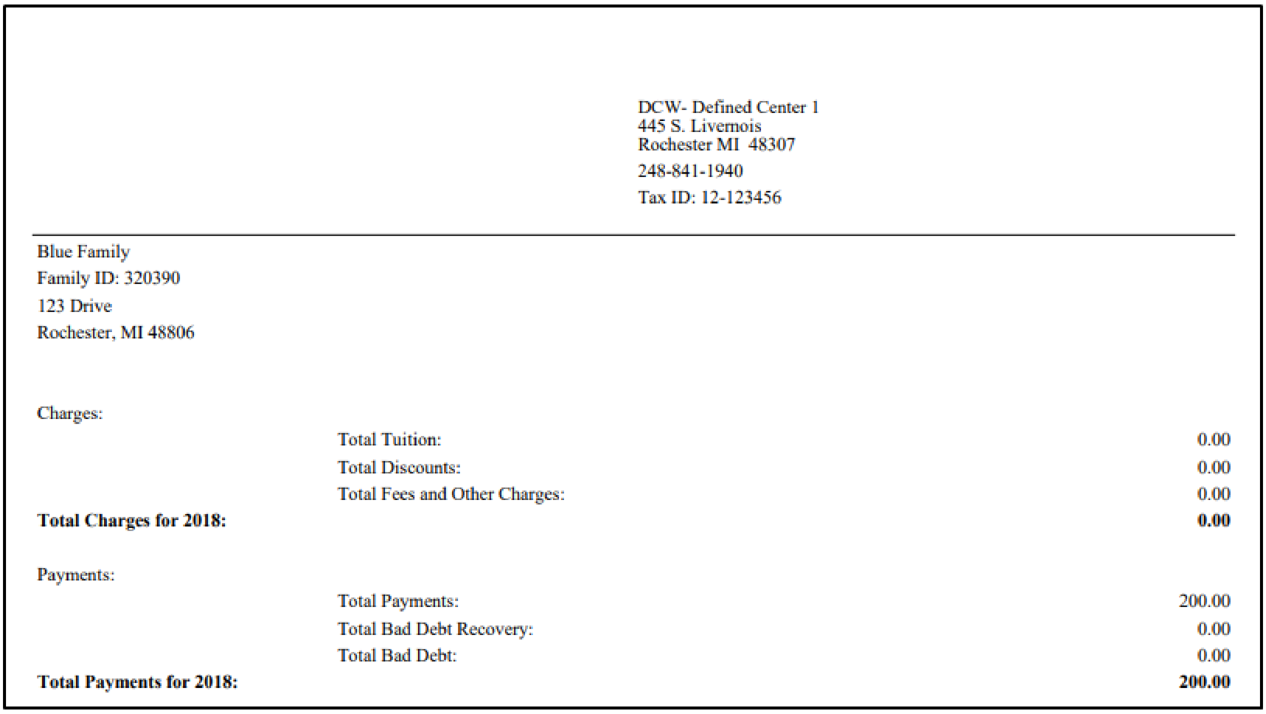
TAX ID: 12-123456

DCW- Defined Center 1 * 445 S. Livernois * Rochester MI 48307

Family Name: Blue Family
Blue, Bonnie and Blue, Bill
Children Name: Bella Blue

Date	UserName	Description	Amount
12/11/2018	dcw_kgass	Cash Payment -	$ 200.00
		Total	$ 200.00

- Tax Statement - PDF - displays charges and payments in PDF format

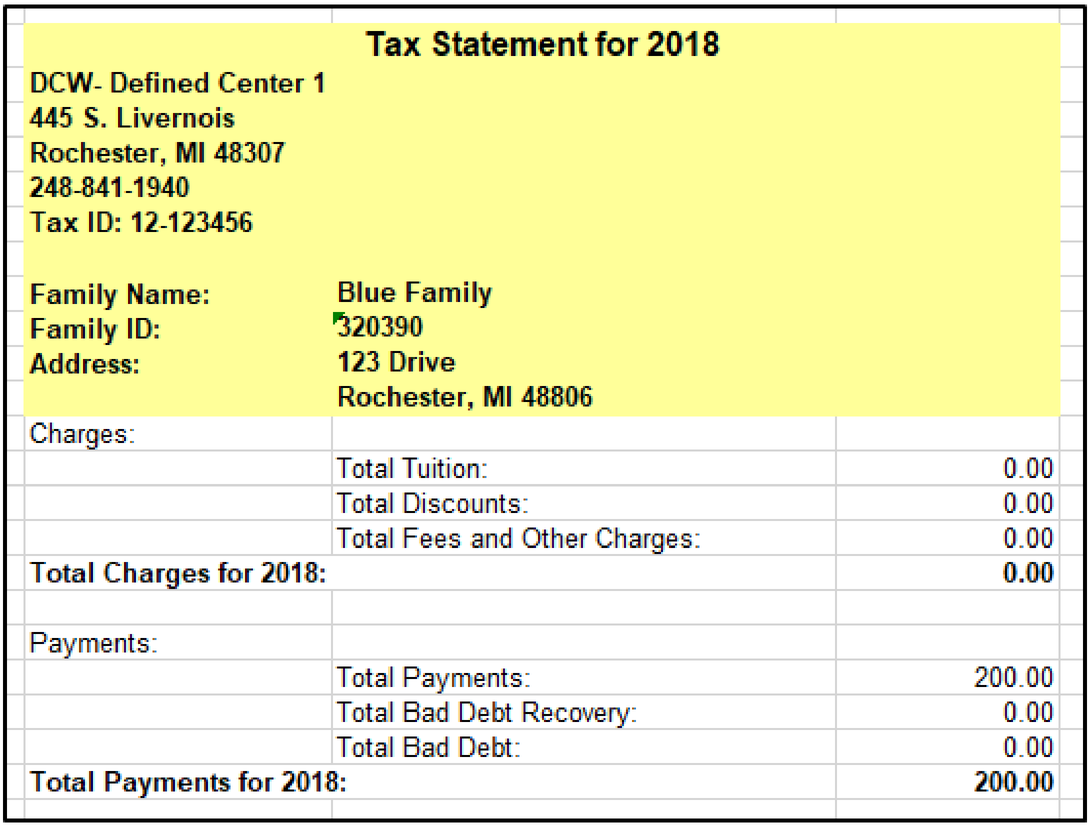


DCW- Defined Center 1
445 S. Livernois
Rochester MI 48307
248-841-1940
Tax ID: 12-123456

Blue Family
Family ID: 320390
123 Drive
Rochester, MI 48806

Charges:		
	Total Tuition:	0.00
	Total Discounts:	0.00
	Total Fees and Other Charges:	0.00
Total Charges for 2018:		**0.00**
Payments:		
	Total Payments:	200.00
	Total Bad Debt Recovery:	0.00
	Total Bad Debt:	0.00
Total Payments for 2018:		**200.00**

- Tax Statement - Excel - displays charges and payments in Excel format with each family on a different worksheet. This option is best for internal use



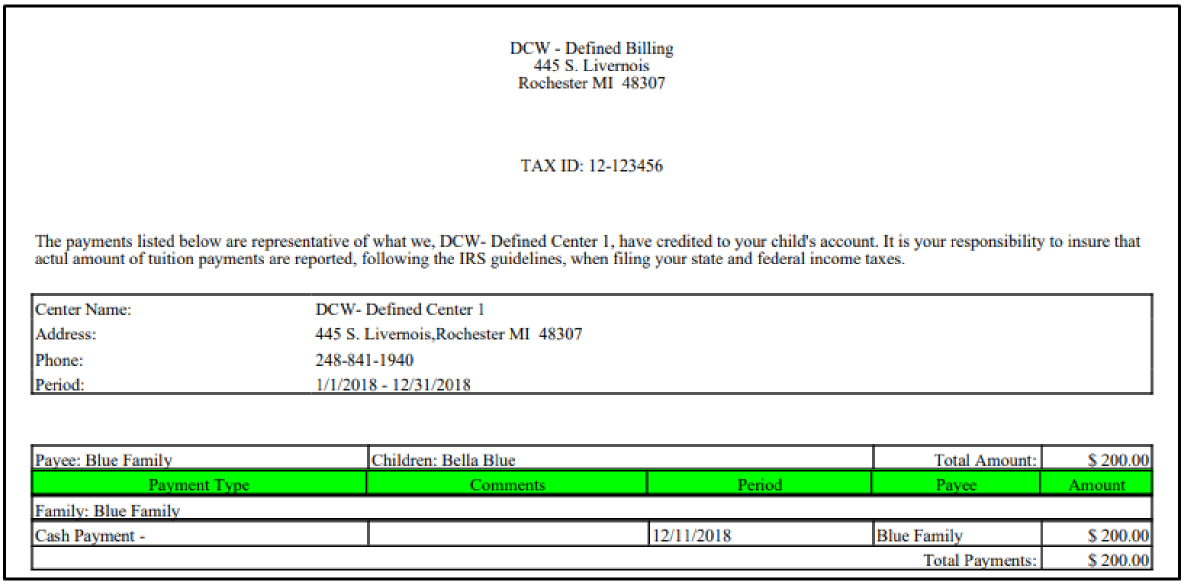
Tax Statement for 2018

DCW- Defined Center 1
445 S. Livernois
Rochester, MI 48307
248-841-1940
Tax ID: 12-123456

Family Name: **Blue Family**
Family ID: **320390**
Address: **123 Drive**
Rochester, MI 48806

Charges:		
	Total Tuition:	0.00
	Total Discounts:	0.00
	Total Fees and Other Charges:	0.00
Total Charges for 2018:		**0.00**
Payments:		
	Total Payments:	200.00
	Total Bad Debt Recovery:	0.00
	Total Bad Debt:	0.00
Total Payments for 2018:		**200.00**

- Multi-Payer Tax Statement - PDF - displays paid balanced by payer. This option allows for separation of balances paid within a single family
  - This report can also be accessed via Reports > Financials. Select Misc in the Report Category and choose Multi Payer Tax Statement as the Report



DCW - Defined Billing
445 S. Livernois
Rochester MI 48307

TAX ID: 12-123456

The payments listed below are representative of what we, DCW- Defined Center 1, have credited to your child's account. It is your responsibility to insure that actual amount of tuition payments are reported, following the IRS guidelines, when filing your state and federal income taxes.

Center Name: DCW- Defined Center 1
Address: 445 S. Livernois,Rochester MI 48307
Phone: 248-841-1940
Period: 1/1/2018 - 12/31/2018

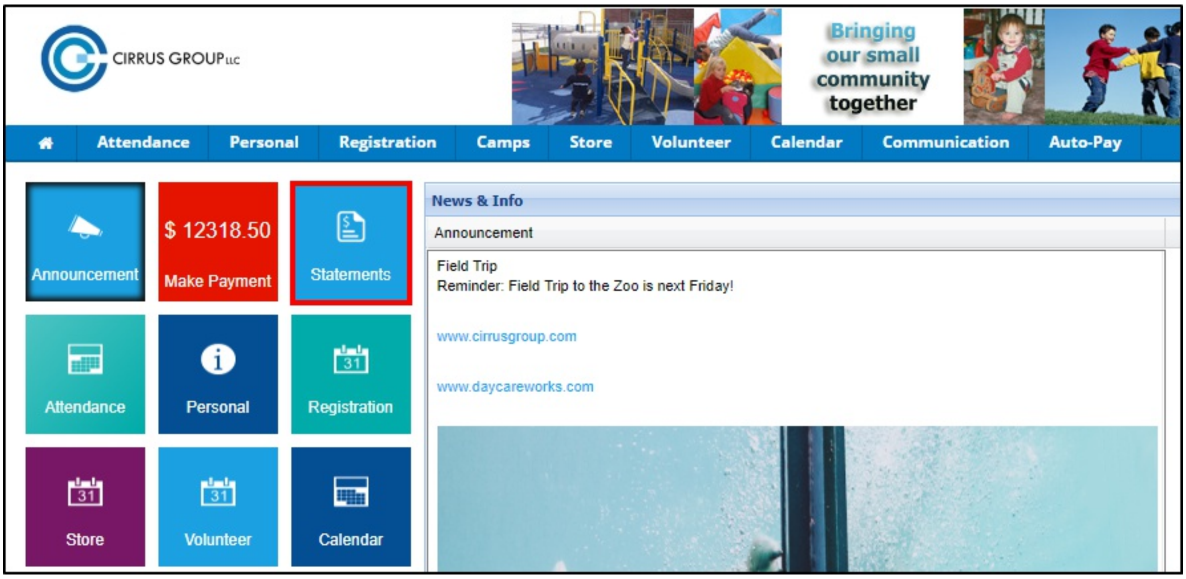
Payee: Blue Family	Children: Bella Blue		Total Amount:	$ 200.00
Payment Type	Comments	Period	Payee	Amount
Family: Blue Family				
Cash Payment -		12/11/2018	Blue Family	$ 200.00
			Total Payments:	$ 200.00

Year End Tax Statements - Self Serve Statements: Parent Portal

Last Modified on 12/26/2018 10:37 am EST

Parents can pull year end tax statements from the Parent Portal by following the steps below:

1. Once a parent is logged in, they click Statements



News & Info

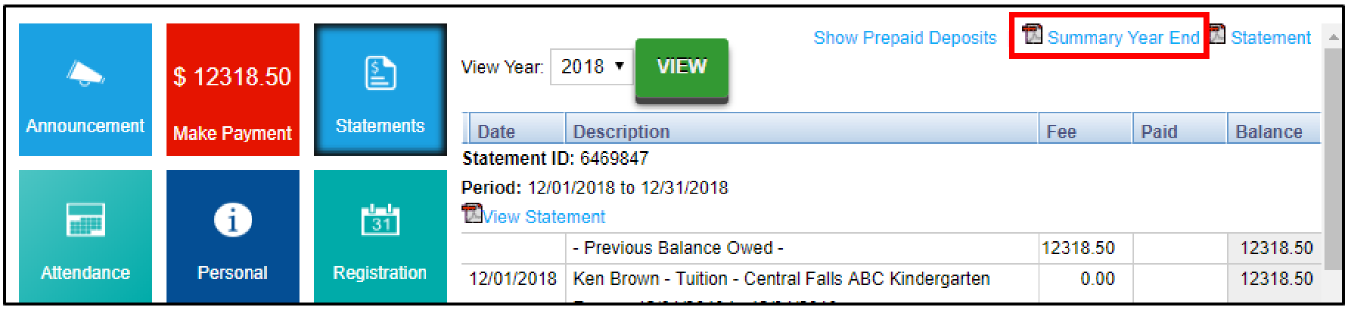
Announcement

Field Trip
Reminder: Field Trip to the Zoo is next Friday!

www.cirrusgroup.com

www.daycareworks.com

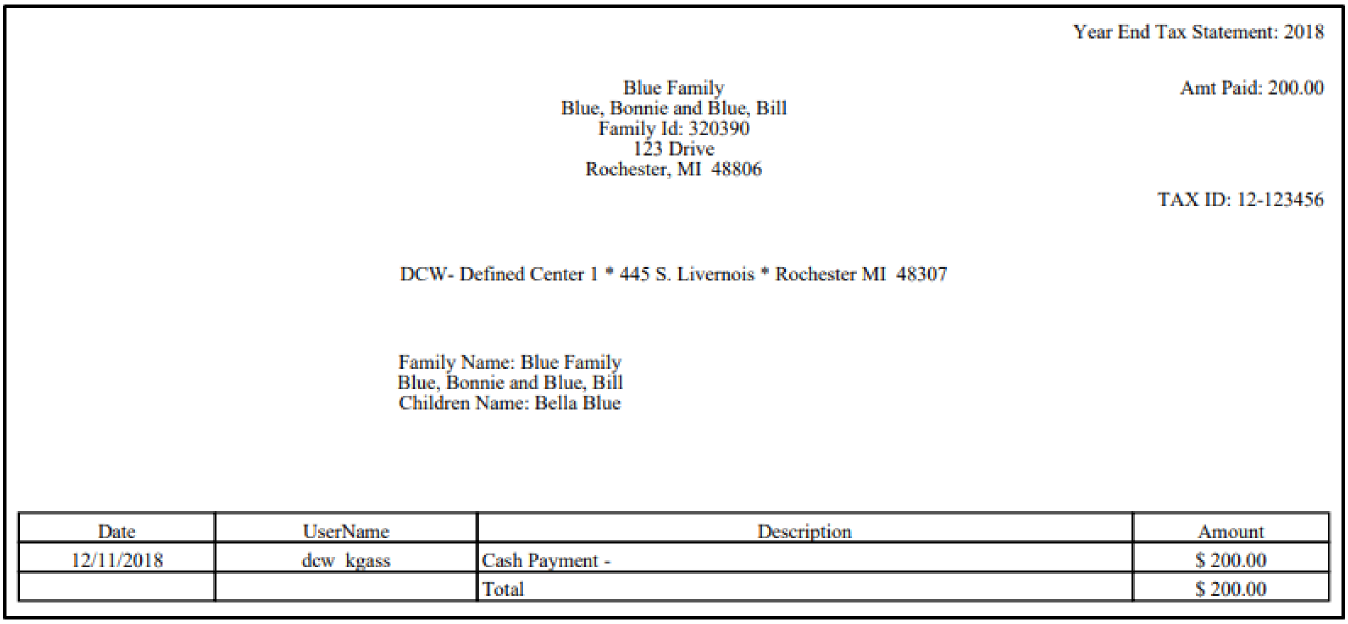
2. On the Statements screen, click Summary Year End



View Year: 2018

Date	Description	Fee	Paid	Balance
Statement ID: 6469847				
Period: 12/01/2018 to 12/31/2018				
View Statement				
	- Previous Balance Owed -	12318.50		12318.50
12/01/2018	Ken Brown - Tuition - Central Falls ABC Kindergarten	0.00		12318.50

3. A PDF statement will option with the family's year end information



Year End Tax Statement: 2018

Blue Family
Blue, Bonnie and Blue, Bill
Family Id: 320390
123 Drive
Rochester, MI 48806

Amt Paid: 200.00

TAX ID: 12-123456

DCW- Defined Center 1 * 445 S. Livernois * Rochester MI 48307

Family Name: Blue Family
Blue, Bonnie and Blue, Bill
Children Name: Bella Blue

Date	UserName	Description	Amount
12/11/2018	dcw kgass	Cash Payment -	$ 200.00
		Total	$ 200.00

CACFP - General Information

Last Modified on 01/16/2019 1:17 pm EST

What is CACFP?

Child and Adult Care Food Program (CACFP) is a federally funded program that "provides aid to child and adult care institutions and family or group day care homes for the provision of nutritious foods that contribute to the wellness, healthy growth, and development of young children, and the health and wellness of older adults and chronically impaired disabled persons." https://www.fns.usda.gov/cacfp/child-and-adult-care-food-program (click the link for more information).

Setting up the CACFP process in the system allows administrators the ability to assign CACFP contracts to students and track the CACFP information for the students based on their eligibility code or family income. The Income Eligibility Guidelines used in this example are based on the USDA CACFP Guidelines, however a center's specific guidelines may differ. The USDA CACFP Income Eligibility Guidelines are available here: USDA CACFP Income Eligibility Guidelines.

Related Articles

- Setup Articles - Income Guidelines, Application Types, General Settings
- Meal Time Settings
- Family Settings - adding a child's status & calculation
- Serving Meals
    - InsIte Provider App (Serve Meals section)
    - Meals > Entry
- CACFP Reporting
    - Meals > Summary
    - Eligibility Report
    - Other Meal Reports

Registration/Enrollment Errors

Last Modified on 06/28/2018 2:56 pm EDT

Problem: Unable to Enroll- Prerequisite programs have not been met for (student name)

Resolution: The parent needs to go to the personal tab on the parent portal and add the required number of contacts that have been set for the program.

Problem: Parents need to review existing child detail before registering for the next semester

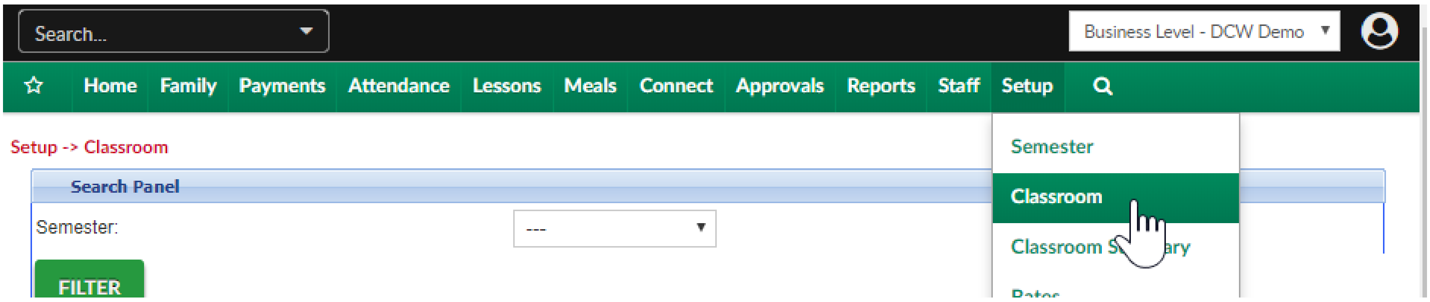
Resolution: The reconfirmation date will force parents to confirm detail on the personal tab of the parent portal is correct. To add a reconfirmation date go to Setup > System Config, then select Registration. The reconfirmation date needs to be a date in the past, not in the future. Enter text in the reconfirmation text box to display a custom message to parents when they first log in- giving them directions to review the child, parent and contact detail- then press the confirmation button at the bottom of the personal page. Once a reconfirmation date has been placed a parent MUST confirm their detail before they can do anything else in the system.

Registration- How do I require additional contacts?

Last Modified on 02/19/2018 8:31 am EST

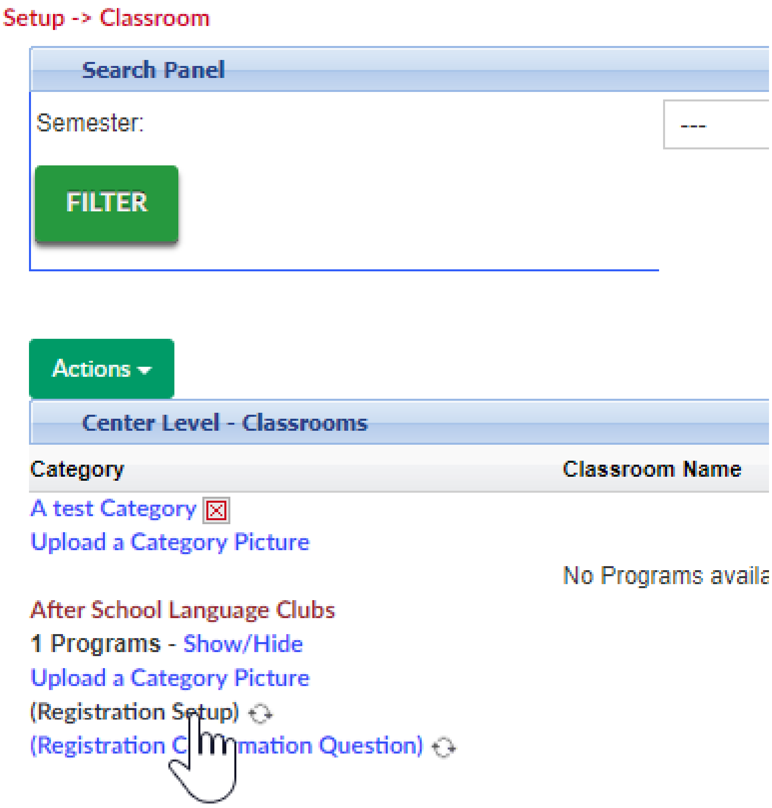
Registration questions asked and number of contacts required can be setup at the category or the room/program level.

To increase or decrease the number of contacts required during registration go to setup > room

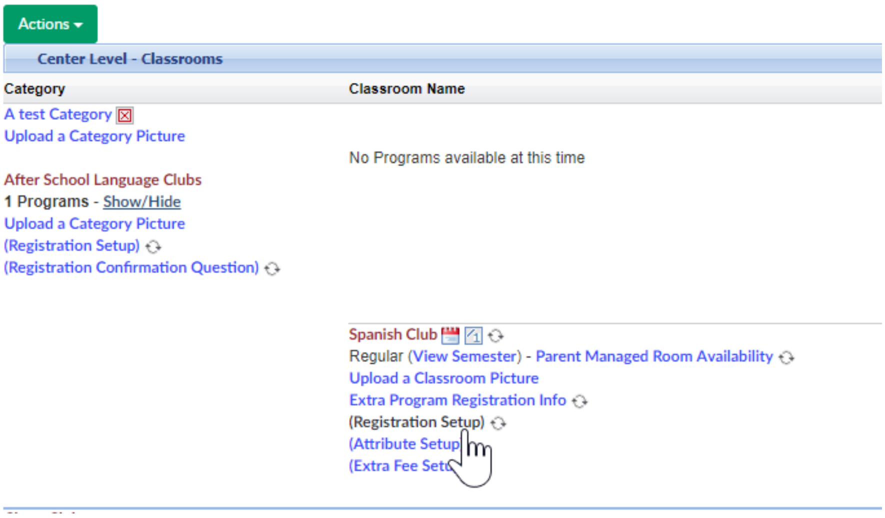


Select the registration setup option under the category or the room/program. Typically registration requirements will be set at the category level.

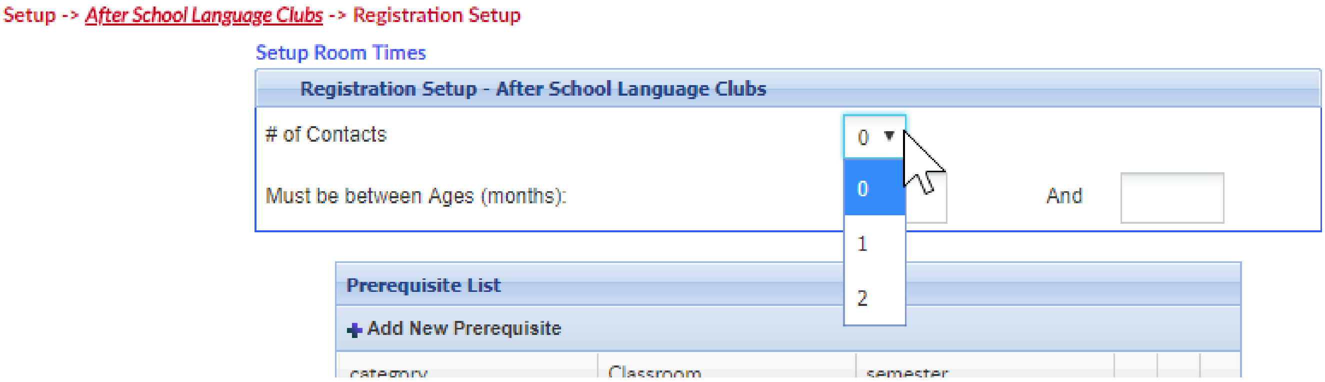
Category level selection-



Room level selection-



Select the required number of contacts, then scroll to the bottom of the page and save. If 1 is selected parents will have to enter contact detail for 1 emergency contact, if 2 is selected parents will have to enter detail for 2 emergency contacts- if 0 is selected 0 contacts will be required.



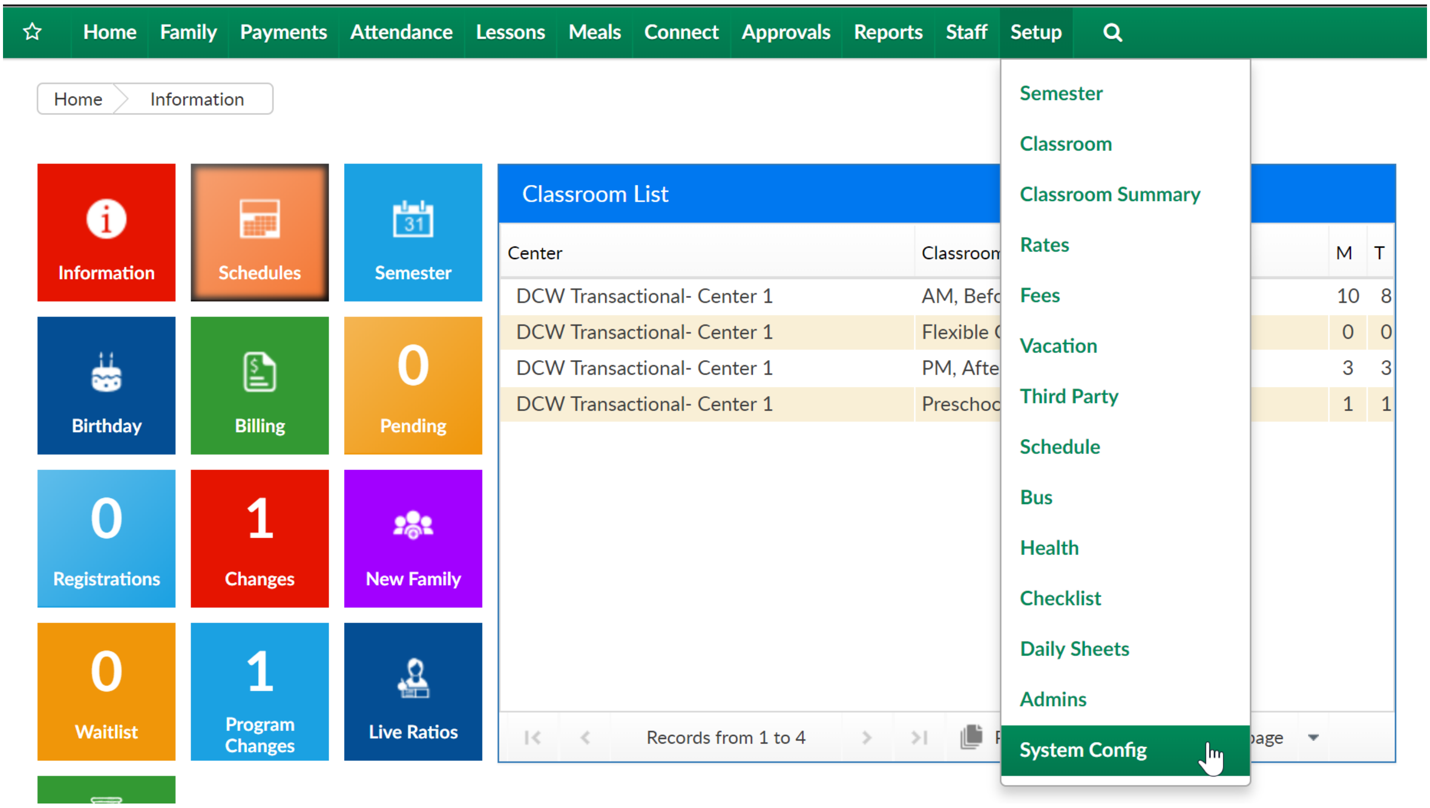
The max number of contacts that can be added from the new registration page is 2- if a parent would like to add additional contacts they would need to go to the personal page of the parent portal after their registration has been approved.

Registration- "Prerequisite programs have not been met" Message

Registration- How do I require parents confirm personal information before registering in the portal?

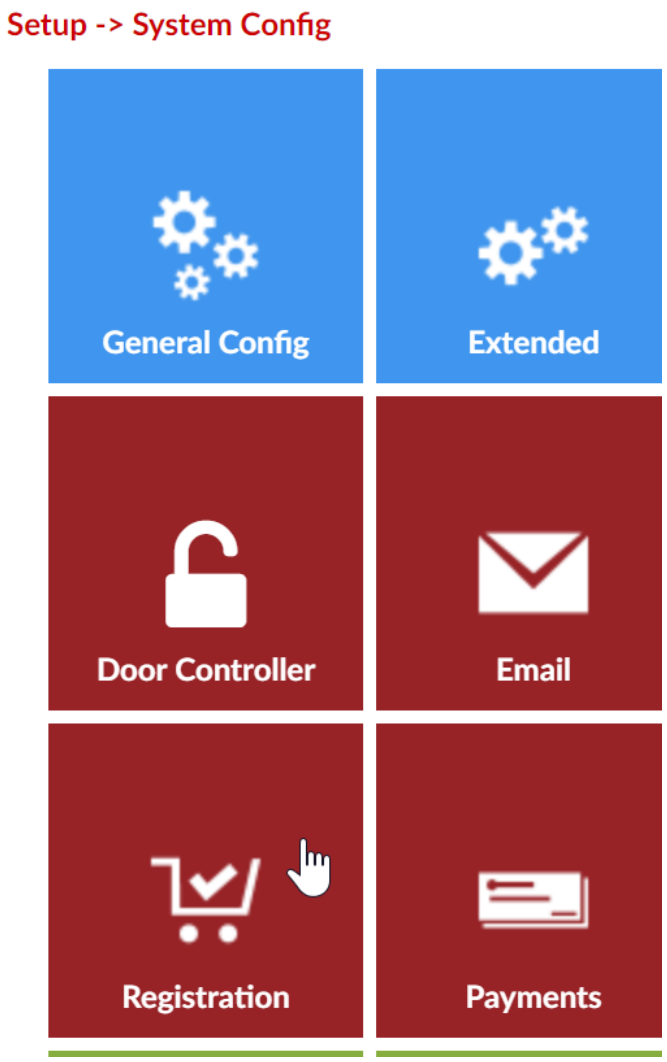
Last Modified on 01/18/2019 8:34 am EST

If you want parents to confirm information on their account is up to date prior to registration (or at any point) this can be done by entering a reconfirmation date and text into the system under Setup > System Config, Registration.



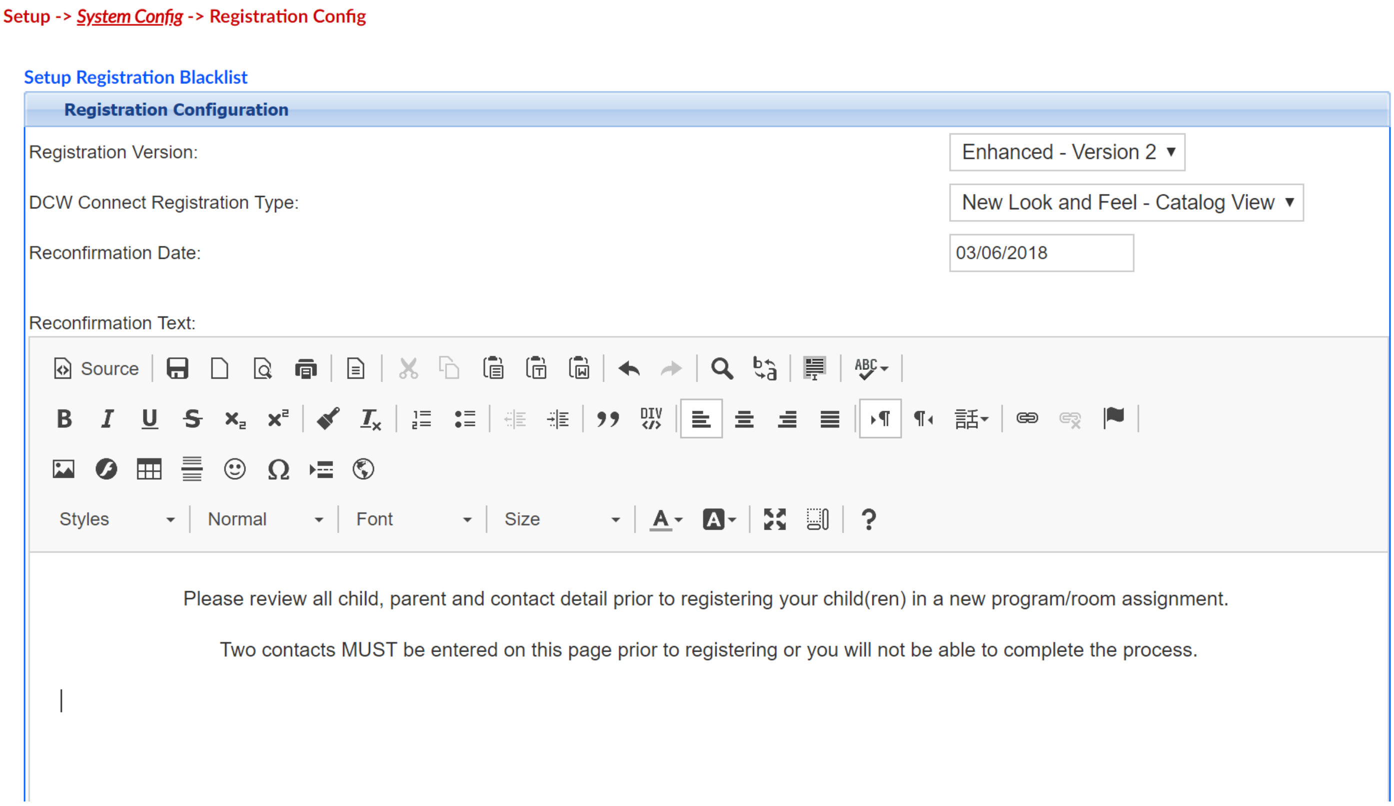
Center	Classroom	M	T
DCW Transactional- Center 1	AM, Befo	10	8
DCW Transactional- Center 1	Flexible (	0	0
DCW Transactional- Center 1	PM, Afte	3	3
DCW Transactional- Center 1	Preschoo	1	1

Then select the Registration tile



Enter a reconfirmation date in the reconfirmation date field. This date must be in the past (cannot be in the future).

- This date must be in the past because as parents log in if they have not confirmed their information since the date indicated they will have to confirm before they are able to complete any other actions within the portal.
    - The reconfirmation date does not trigger an email notification to parents that they must go to the parent portal to confirm their detail, if parents should be notified to go to the portal to update their detail an email can be sent manually from the Connect > Communications screen.



Registration Version: Enhanced - Version 2

DCW Connect Registration Type: New Look and Feel - Catalog View

Reconfirmation Date: 03/06/2018

Reconfirmation Text:

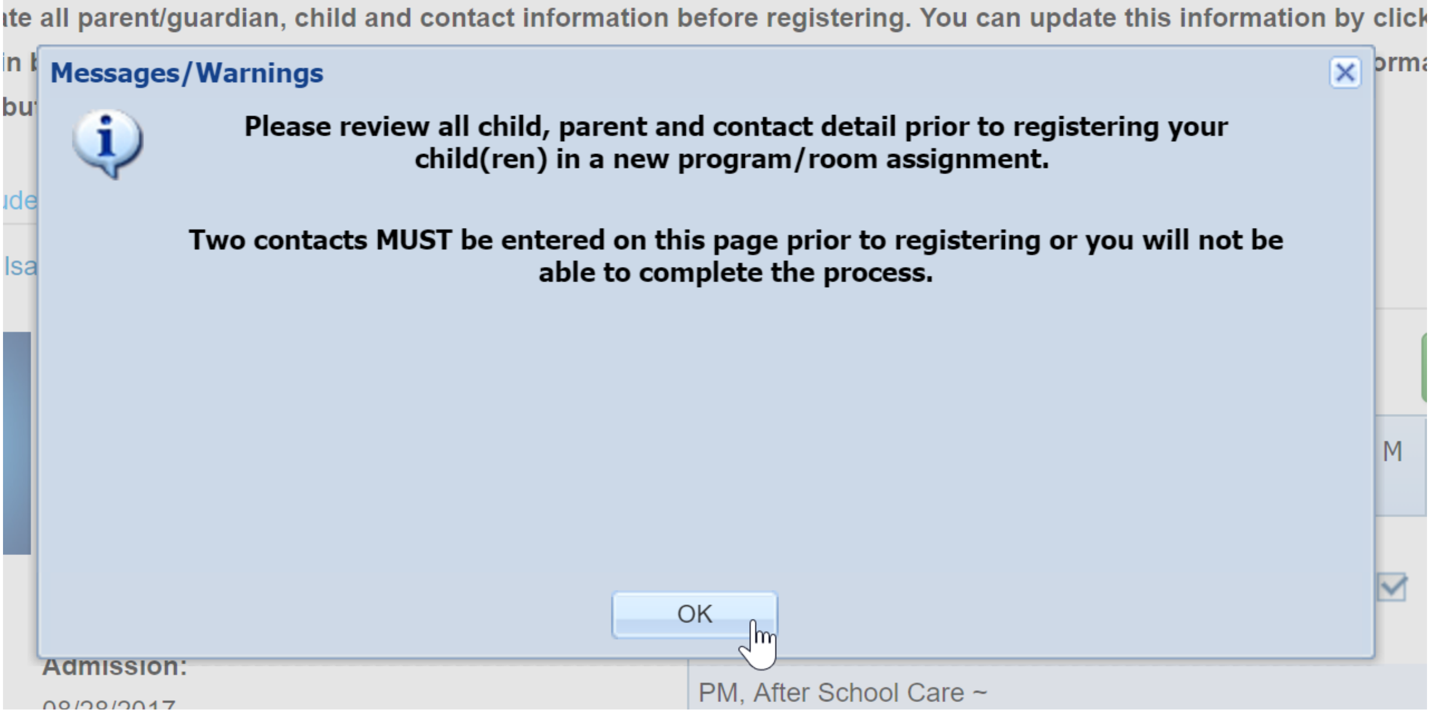
Please review all child, parent and contact detail prior to registering your child(ren) in a new program/room assignment.

Two contacts MUST be entered on this page prior to registering or you will not be able to complete the process.

Enter the text that should display when a parent first logs in, this text should direct them to review their child's information, parent detail and add contacts if required before trying to register.

Scroll to the bottom of the page and save.

The next time the parent tries to login to the parent portal they will immediately see the message that has been entered on the registration config screen and be taken to the personal tab of the parent portal.



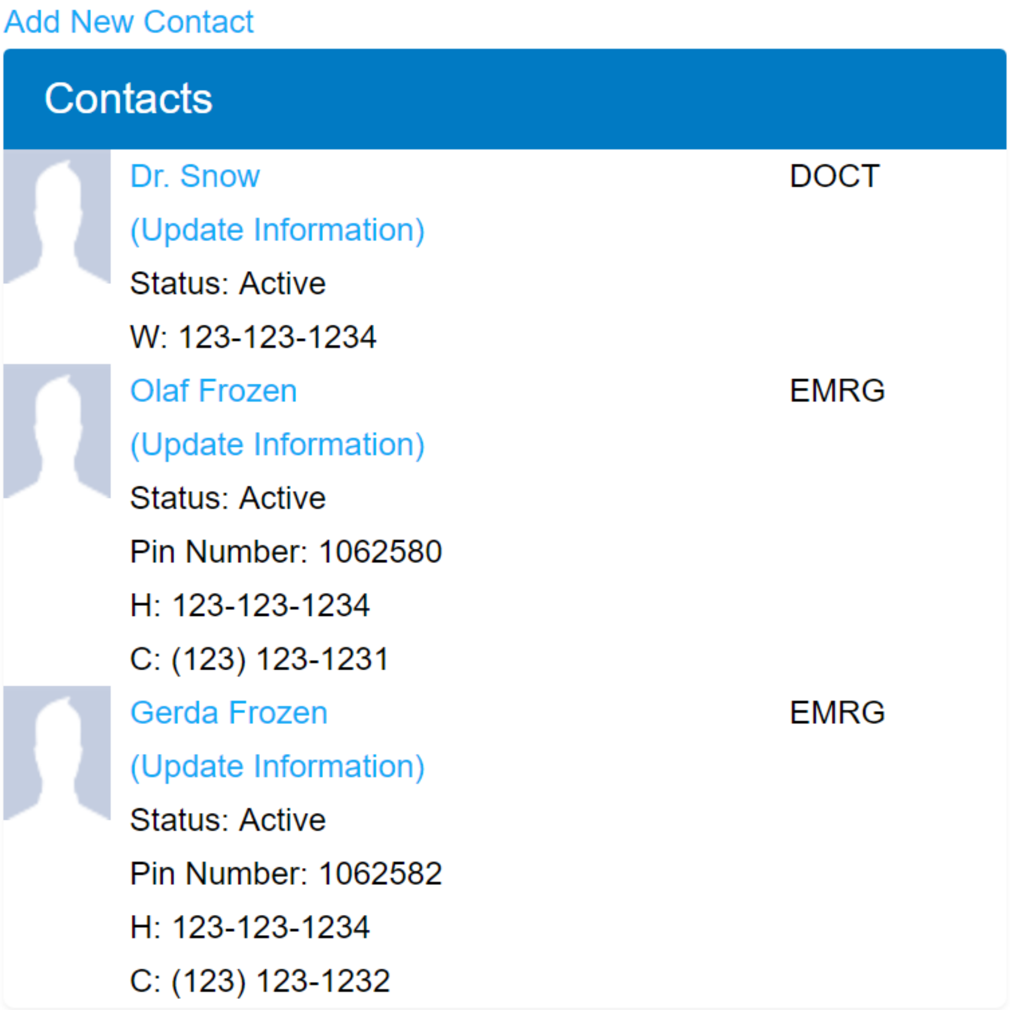
Messages/Warnings

Please review all child, parent and contact detail prior to registering your child(ren) in a new program/room assignment.

Two contacts MUST be entered on this page prior to registering or you will not be able to complete the process.

On the information screen, parents will be able to review child, parent and contact data.

Once the information has been reviewed the parent can select the Confirm Information is Correct button.


Add New Contact

Contacts

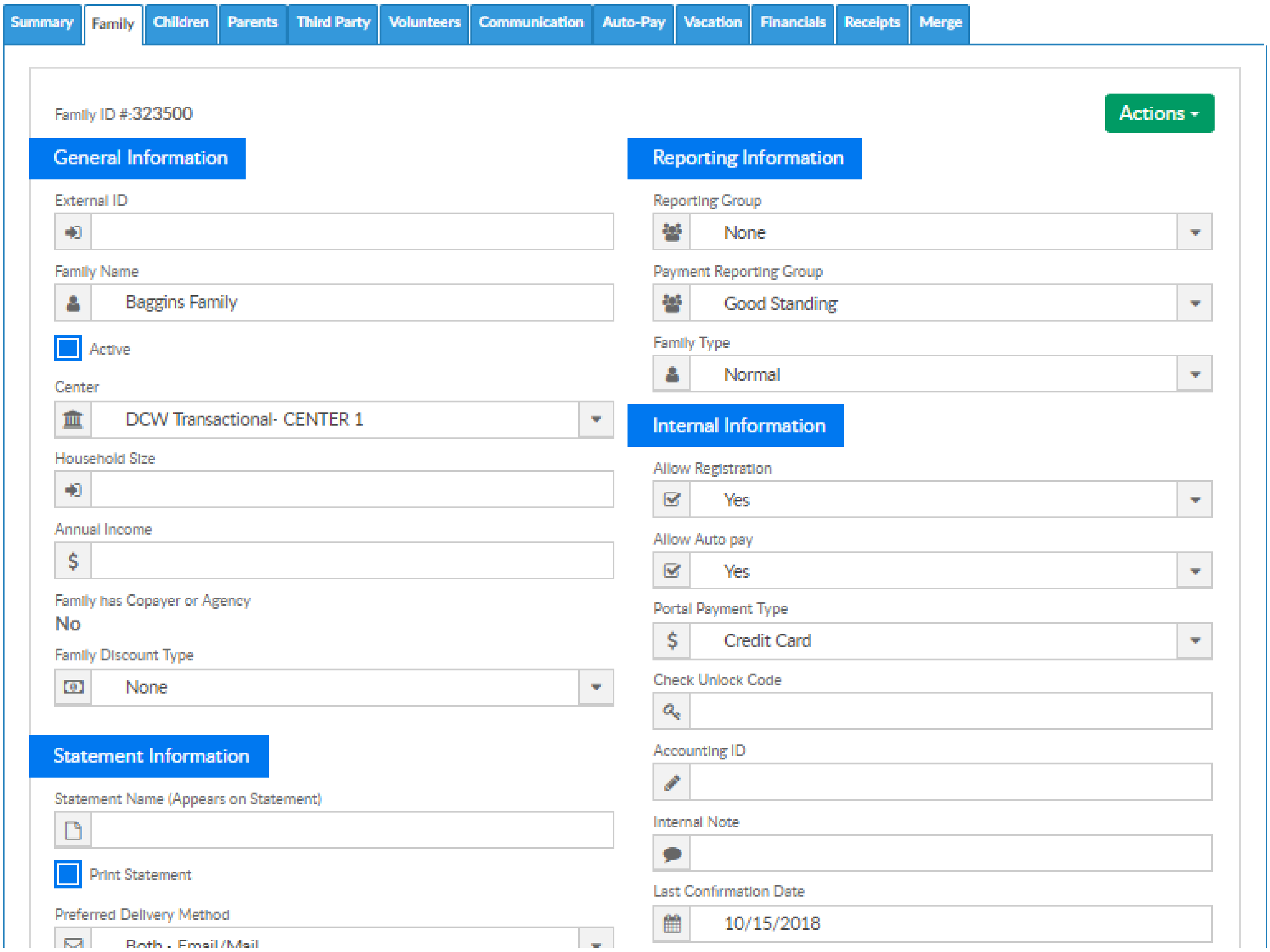
Dr. Snow DOCT
(Update Information)
Status: Active
W: 123-123-1234

Olaf Frozen EMRG
(Update Information)
Status: Active
Pin Number: 1062580
H: 123-123-1234
C: (123) 123-1231

Gerda Frozen EMRG
(Update Information)
Status: Active
Pin Number: 1062582
H: 123-123-1234
C: (123) 123-1232

The parent will not see this message again until the reconfirmation date on the registration config tab is updated.

The last confirmation date for a family can be seen on the admin side in the family record on the family tab .



Family ID #:323500

General Information

External ID:

Family Name: Baggins Family

☐ Active

Center: DCW Transactional- CENTER 1

Household Size:

Annual Income: $

Family has Copayer or Agency: No

Family Discount Type: None

Statement Information

Statement Name (Appears on Statement):

☐ Print Statement

Preferred Delivery Method: Both - Email/Mail

Reporting Information

Reporting Group: None

Payment Reporting Group: Good Standing

Family Type: Normal

Internal Information

Allow Registration: Yes

Allow Auto pay: Yes

Portal Payment Type: Credit Card

Check Unlock Code:

Accounting ID:

Internal Note:

Last Confirmation Date: 10/15/2018

Registration- How do I setup e-signatures?

Last Modified on 03/08/2018 10:05 am EST

There are three different ways to capture a parent signature during the registration process. Two electronic signature options and a mouse signature option.

These signatures can be coded to display on Child Information PDF forms.

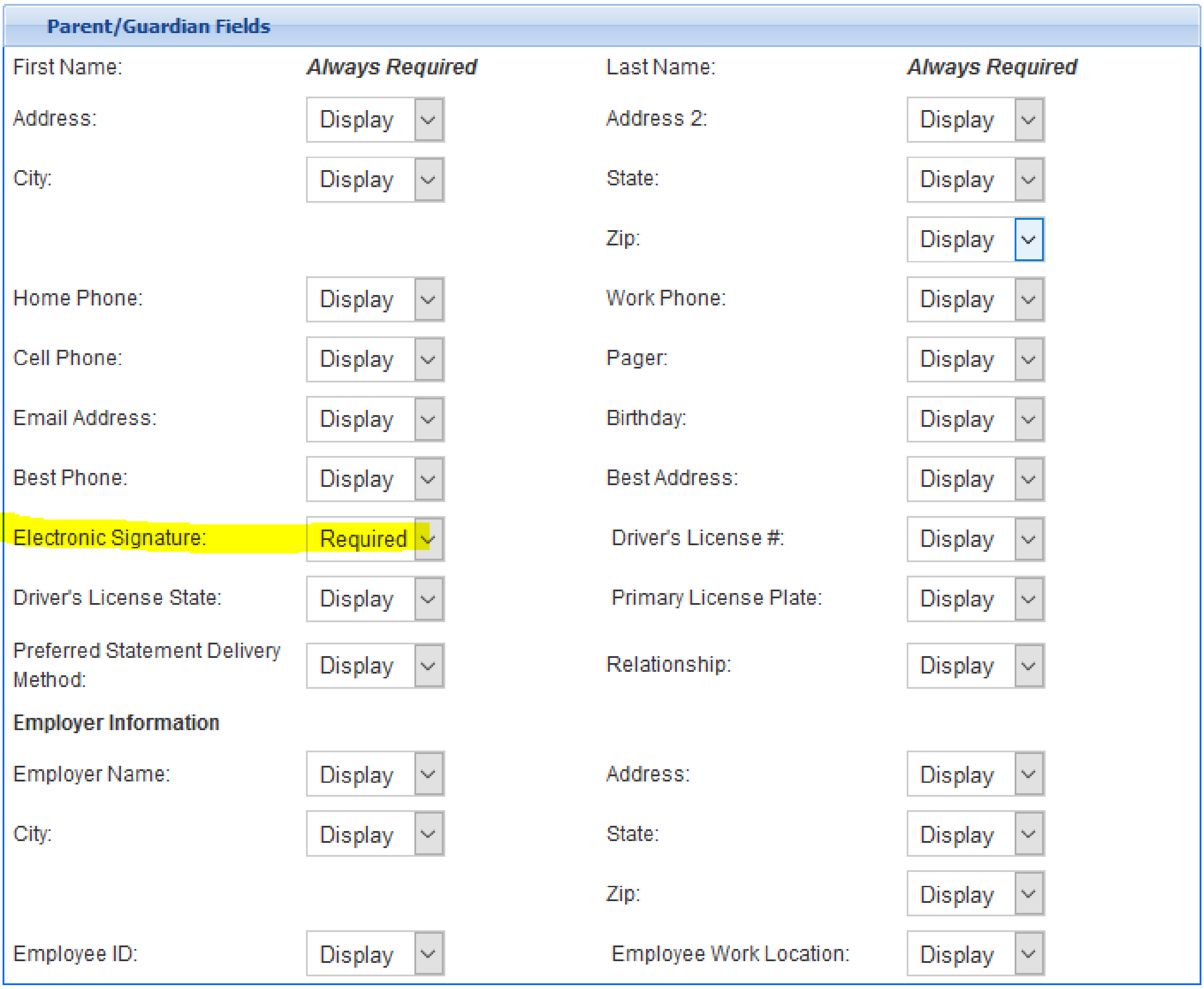
The signature can also be updated after registration by parents using the Connect Portal or by Administrators who have permission to edit family account information. We suggest selecting one of these options and turning the other two options off to avoid confusion during registration.

1.) Electronic (typed) Signature for Both Guardians with Guardian Information-

This signature is a typed signature that is collected on the first page of registration along with guardian information. This option allows you to collect typed signatures for both guardians.

To turn this on, the field requirements on the Setup Registration (**Setup>Room>Setup Registration** link at category or room level) screen for the category or room must be set to Display (optional) or Required (must enter) under the Parent/Guardian fields section.

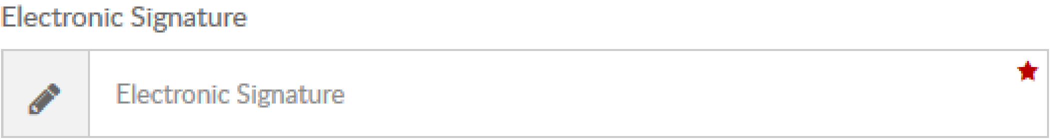
Setting electronic signature to required:



Parent/Guardian Fields

First Name:	*Always Required*	Last Name:	*Always Required*
Address:	Display	Address 2:	Display
City:	Display	State:	Display
		Zip:	Display
Home Phone:	Display	Work Phone:	Display
Cell Phone:	Display	Pager:	Display
Email Address:	Display	Birthday:	Display
Best Phone:	Display	Best Address:	Display
Electronic Signature:	Required	Driver's License #:	Display
Driver's License State:	Display	Primary License Plate:	Display
Preferred Statement Delivery Method:	Display	Relationship:	Display
Employer Information			
Employer Name:	Display	Address:	Display
City:	Display	State:	Display
		Zip:	Display
Employee ID:	Display	Employee Work Location:	Display

How setting displays on registration page (red star indicates the field is required before continuing to next page):



Electronic Signature

Things to keep in mind with this option:

- Whatever a parent types into the electronic signature box will be saved in the Family Record on the Parent Tab as Electronic Signature.
- If this option is combined with option 2, the signature will be collected twice during registration, once when entering guardian information and again upon submitting the registration.

- The first signature entry is what will be saved in their record.
- This option is the only way to require an electronic signature from Guardian 2 at the time of registration.
- This setting, because it is set at the category or room level, is the only signature option that can be set differently (displayed, required, or hidden) for each program or category of programs.

2.) Electronic Signature on Registration Submission

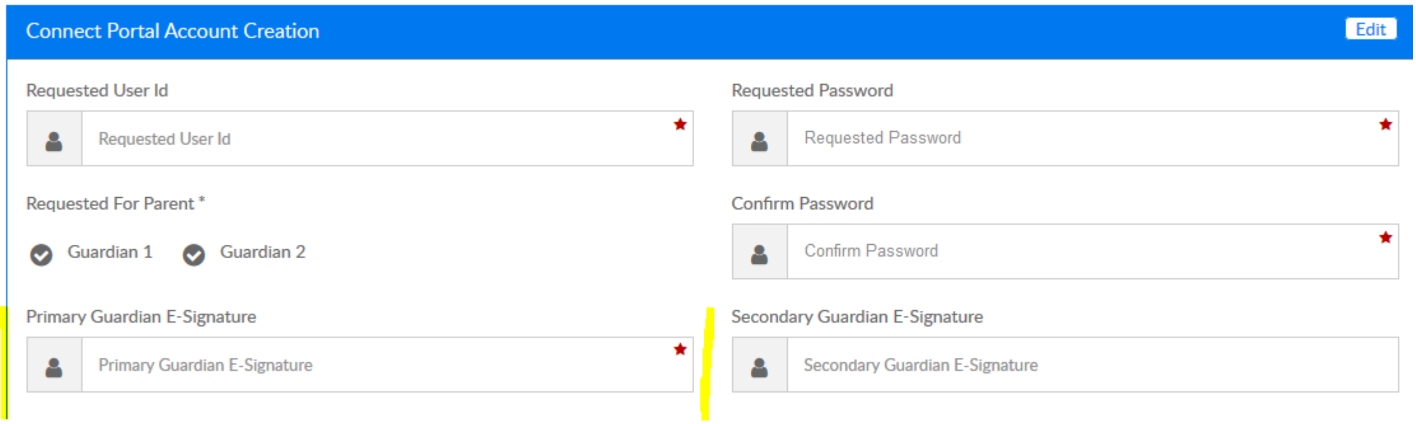
This signature is also typed, but is collected on the last page of registration.

There are two different ways to collect this signature, In-Line and Pop-up. Changes made to this setting will apply to all registration pages (unlike option 1 which can be set differently for each category or program registration form).

- To setup an in-line electronic signature for registration, go to Setup > System Config > Registration and set "Display Electronic Signature Field" to "Yes-Inline" and save:

Display Electronic Signature Field: Yes - Inline

- This setting will appear under the Connect Portal Account Creation section on the second page of new registration, only one signature (for Guardian 1) will be required:



Connect Portal Account Creation

Requested User Id: Requested User Id *

Requested Password: Requested Password *

Requested For Parent *: ● Guardian 1 ● Guardian 2

Confirm Password: Confirm Password *

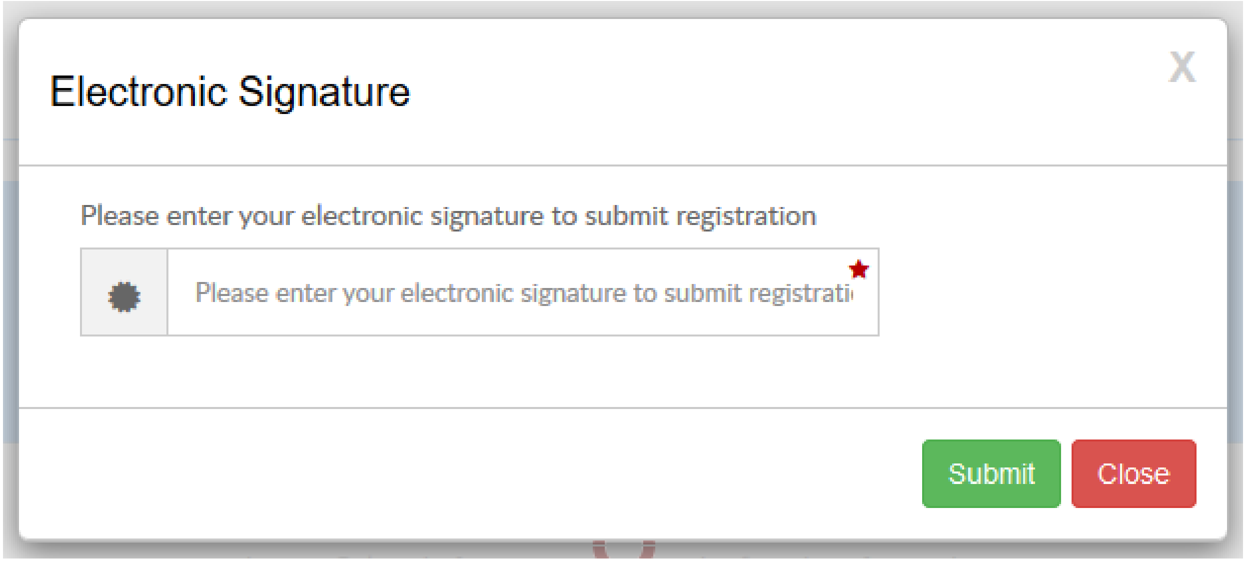
Primary Guardian E-Signature: Primary Guardian E-Signature *

Secondary Guardian E-Signature: Secondary Guardian E-Signature

- To setup a pop-up electronic signature for registration, go to Setup > System Config > Registration and set "Display Electronic Signature Field" to "Yes-Popup" and save:

Display Electronic Signature Field Yes - Popup

This option will ask for one signature (saved with Guardian 1 information) after clicking "Complete Registration" at the end of the registration process and will be required before registration is submitted:



Electronic Signature

Please enter your electronic signature to submit registration

Please enter your electronic signature to submit registrati

---

3) Mouse Captured Signature

This option will allow for the capture of a mouse signature. If used with a touch screen, users can use a stylus or their finger to sign. If used with non-touch screen, users can use their mouse to sign.

To turn on the Mouse Signature option, go to **Setup** > **System Config** > **Registration** and set Allow Mouse Captured Signature to Yes and save.

- You can also set an expiration on the signature, which would prompt guardians to re-submit a signature after their mouse signature is older than the validity in days (-1 validity= never expires (default), 0 validity = requested for every registration, 1+ = signature requested if registering after given number of days has passed since last registration signature).

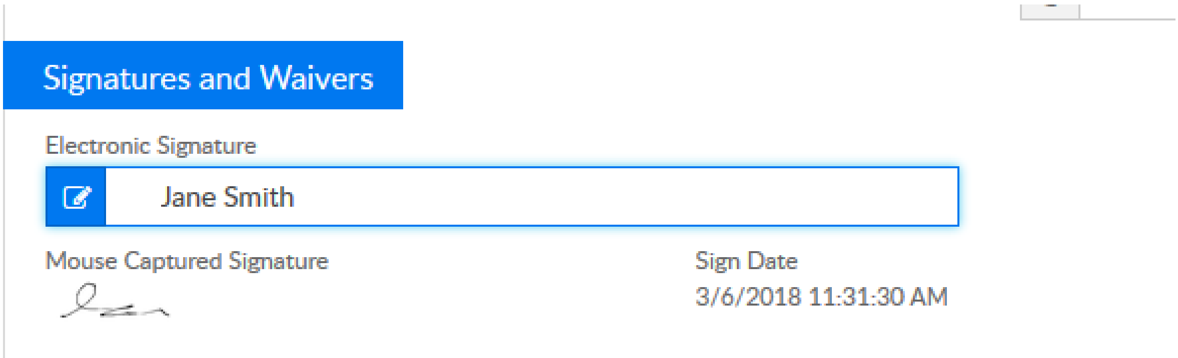
Allow Mouse Captured Signature Yes

Signature Validity in Days:
(0 - Requires signature everytime
-1 - Signature never expires
or the number of days) -1

The Mouse Captured

Signature pop-up will appear after the user clicks Complete Registration at the end of the registration process and require a successful signature capture before the registration is submitted.

To view signatures for a parent on the Provider Web administrative platform, go to the Parent tab in the Family Record. Electronic and Mouse Captured signatures will be displayed under the signatures and waivers section. Only Electronic Signatures are editable here:



Electronic Signature

Jane Smith

Mouse Captured Signature

Sign Date

3/6/2018 11:31:30 AM

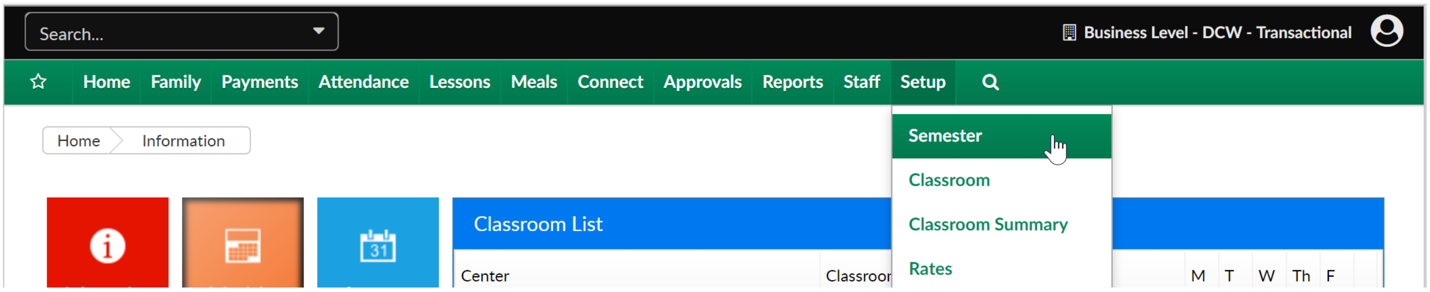
Parents can update their electronic signature in the Connect Portal (family.daycareworks.com or family.schoolcareworks.com) by clicking the Personal Tab, clicking Update Information next to their name, and editing the Electronic Signature section. Mouse captured signatures can only be entered during the registration process.

Semester- How do I clone a semester?

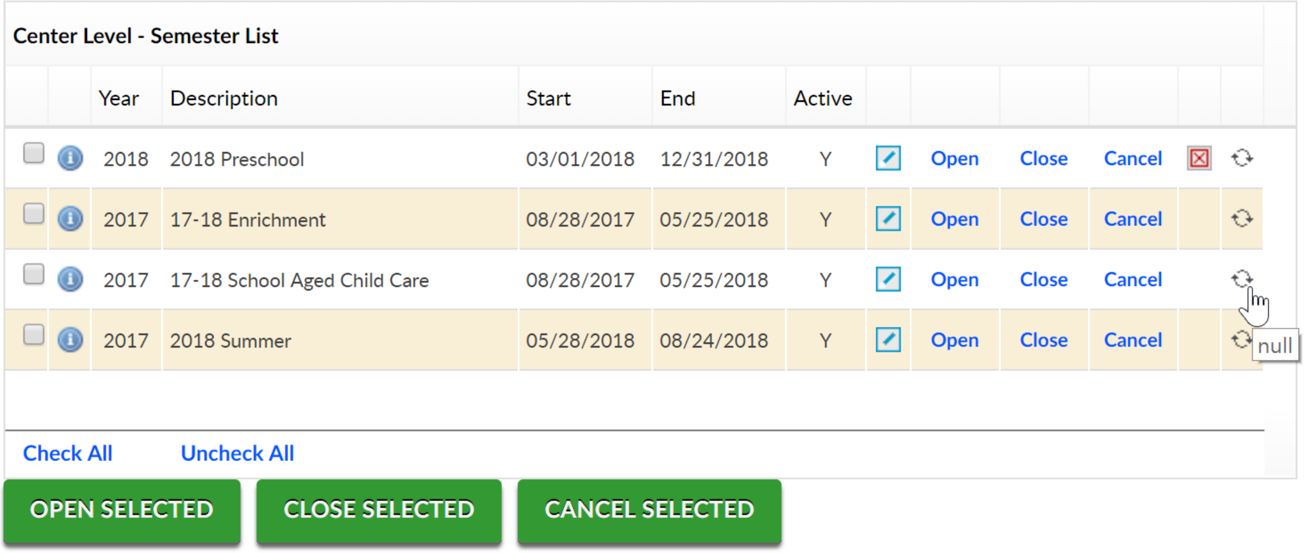
Last Modified on 06/28/2018 2:59 pm EDT

When cloning a semester, it is important to remember that this means all of the rooms that were associated to the semester will be copied to the new semester.

Go to the Setup > Semester screen-



Then scroll to the bottom of the page and next to the semester you want to clone select the clone icon.

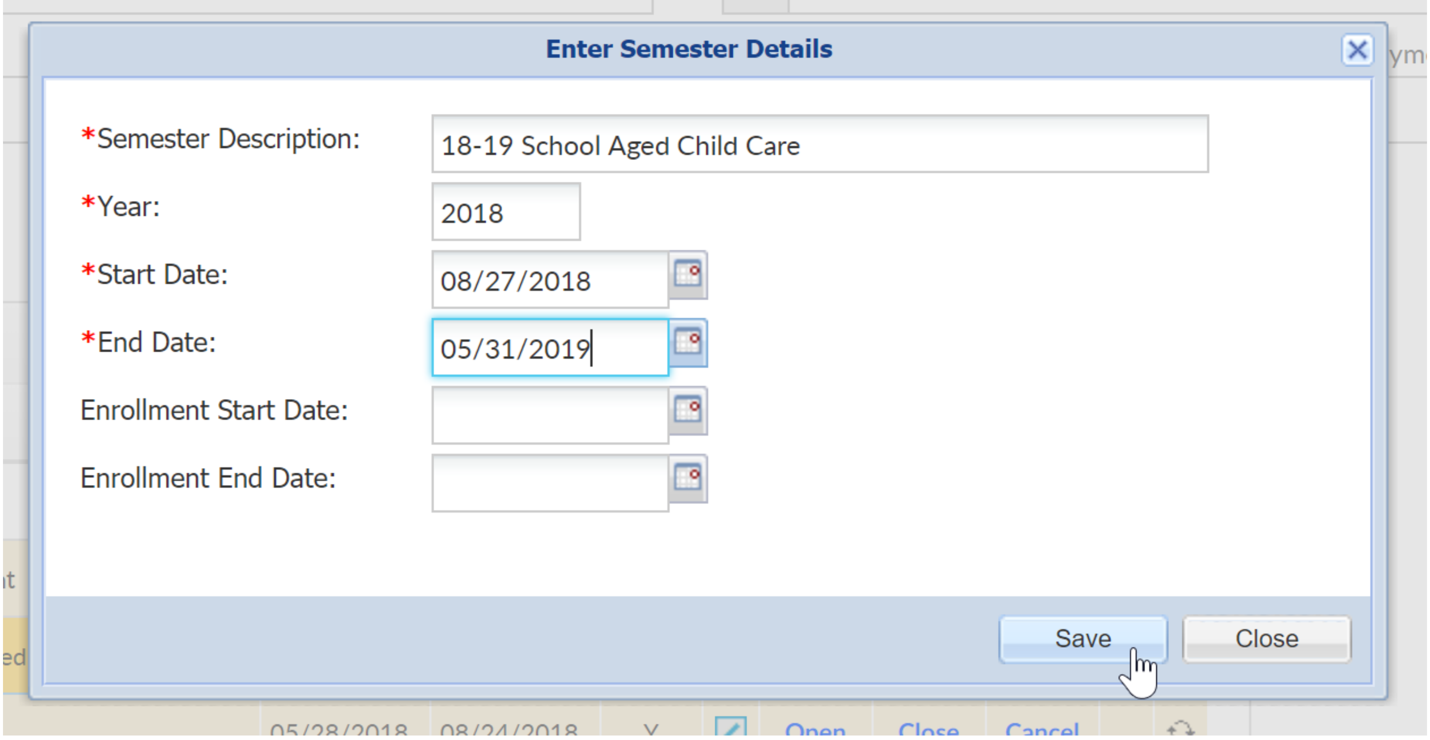


Center Level - Semester List

	Year	Description	Start	End	Active						
☐	2018	2018 Preschool	03/01/2018	12/31/2018	Y		Open	Close	Cancel	☒	
☐	2017	17-18 Enrichment	08/28/2017	05/25/2018	Y		Open	Close	Cancel		
☐	2017	17-18 School Aged Child Care	08/28/2017	05/25/2018	Y		Open	Close	Cancel		
☐	2017	2018 Summer	05/28/2018	08/24/2018	Y		Open	Close	Cancel		

Enter the new semester's detail, then press Save

- Semester Description- name
- Year
- Start Date
- End Date



*Semester Description: 18-19 School Aged Child Care

*Year: 2018

*Start Date: 08/27/2018

*End Date: 05/31/2019

Enrollment Start Date:

Enrollment End Date:

Once the screen refreshes, all rooms have now been associated to the cloned semester.

To update program and registration dates go to either of the areas below-

- Semester Summary screen
- Setup > Room, View Semester screen

If you have parent managed calendars you will need to add the days to each calendar the option will be available- parent managed availability

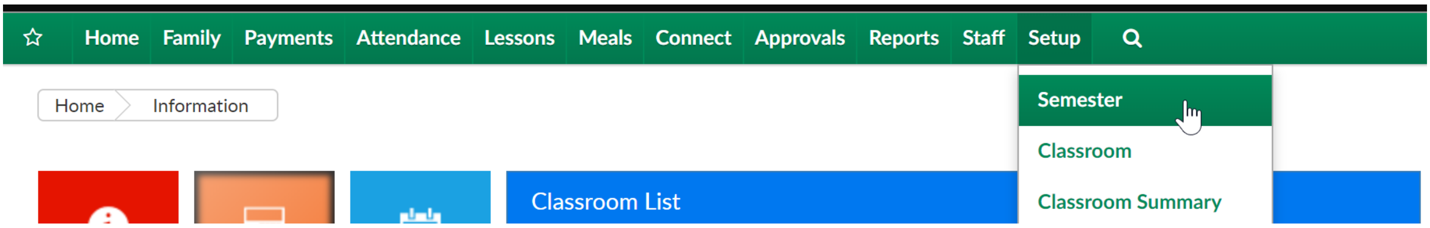
Registration- Why isn't my room/program displaying as an option for registration?

Last Modified on 06/28/2018 3:01 pm EDT

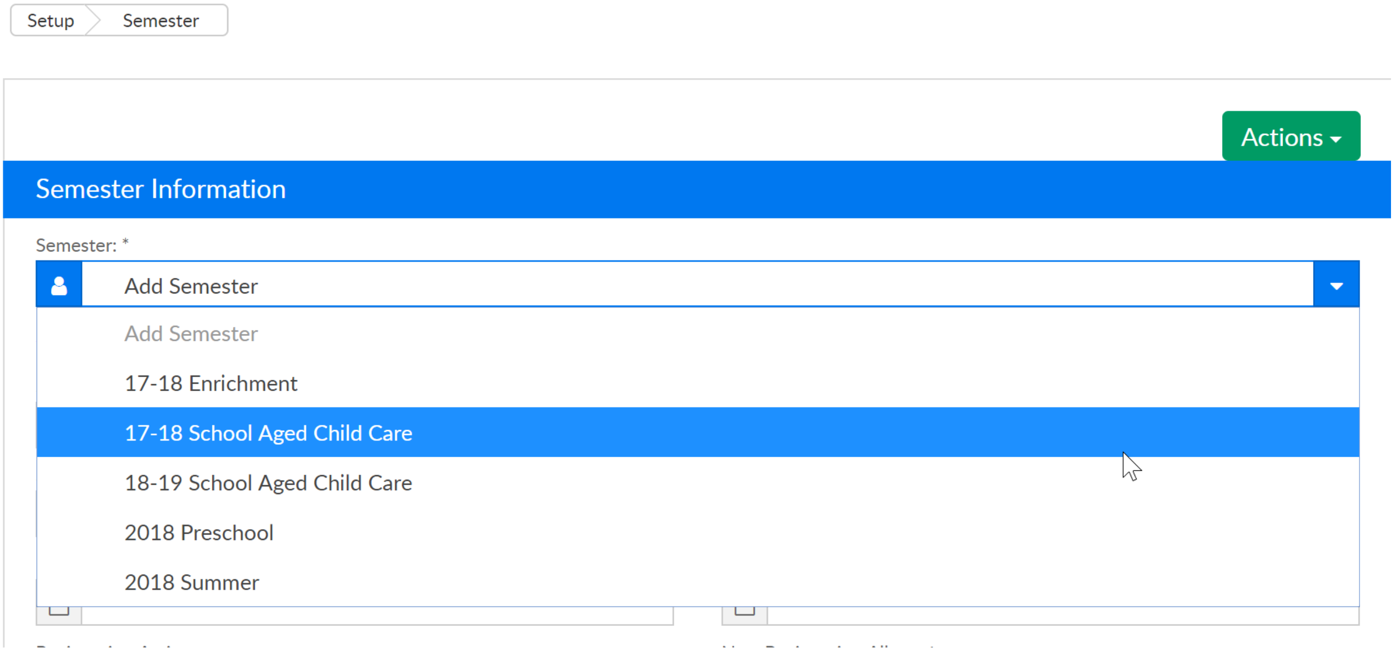
Here are some common troubleshooting tips for why a room may not display as an option on the registration screen:

Check to see if the semester's registration is active-

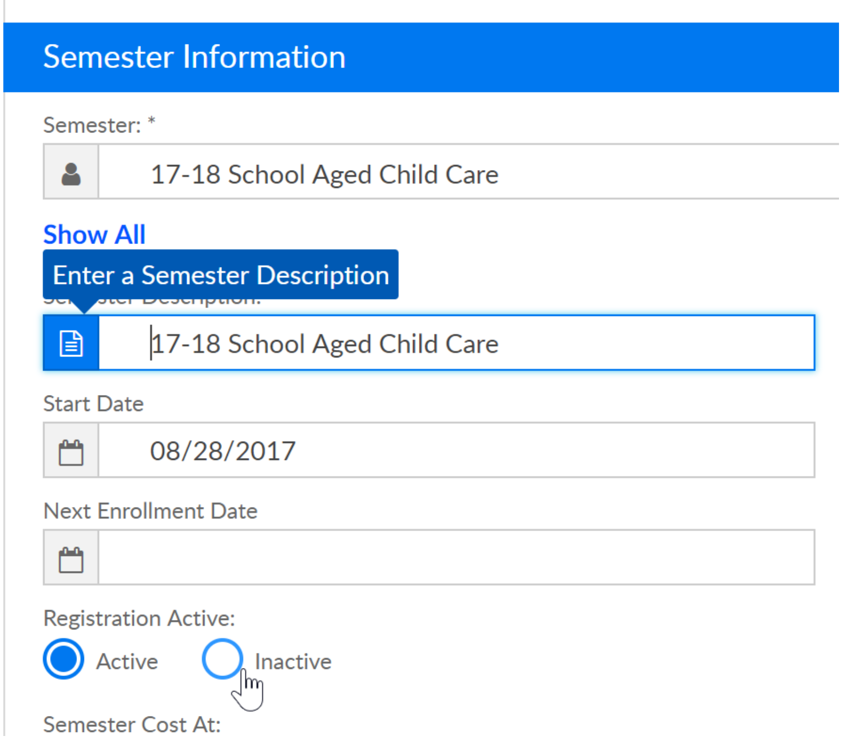
Go to setup > semester and check to make sure the semester registration is active-



Select a semester from the drop down list-



Check if registration is active by looking at the Registration Active field (room/semesters should display) or inactive (no room/semesters will display)-



Semester: * 17-18 School Aged Child Care

Semester Description: 17-18 School Aged Child Care

Start Date: 08/28/2017

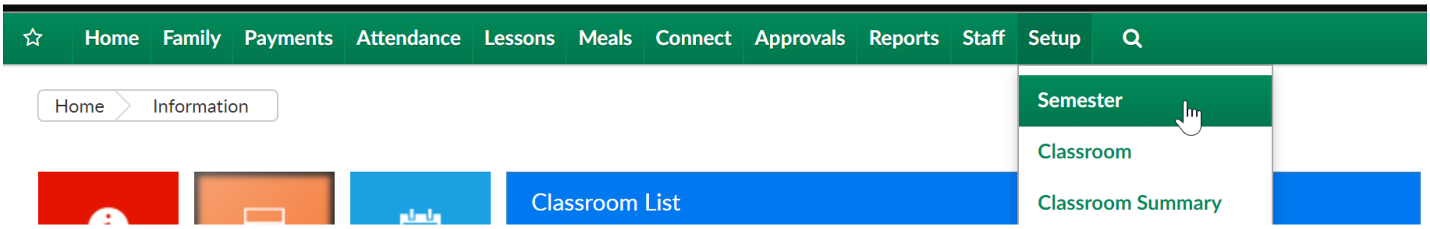
Next Enrollment Date:

Registration Active: ● Active ○ Inactive

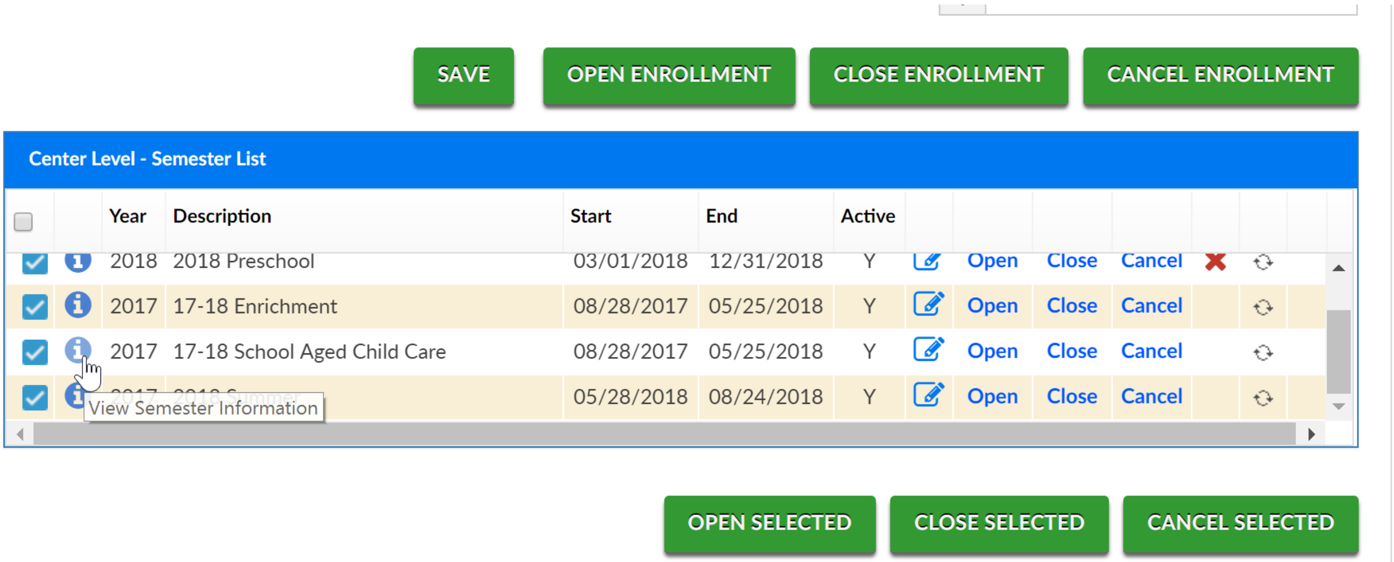
Semester Cost At:

Check to see if the registration dates are correct (if dates are different by site)-

Go to setup > semester-

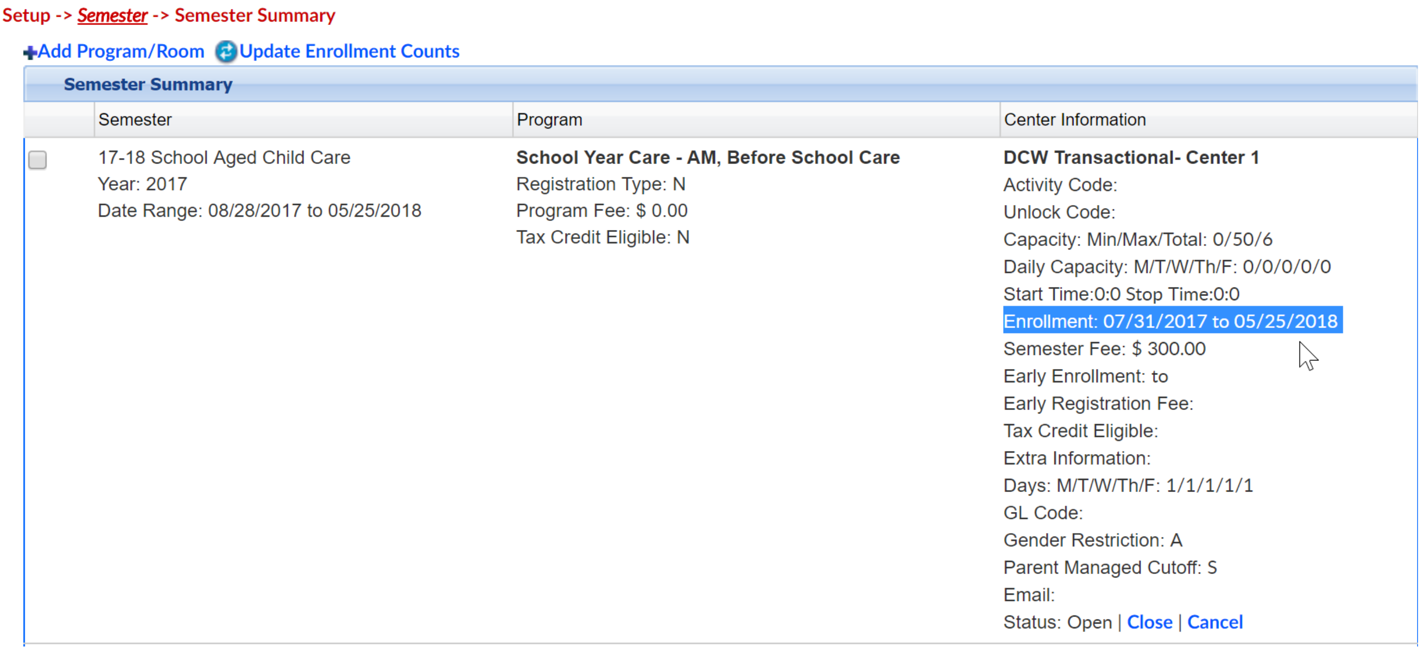


Scroll down to the Center Level- Semester list and press the blue i next to the semester's name-



☐		Year	Description	Start	End	Active						
☑	ℹ	2018	2018 Preschool	03/01/2018	12/31/2018	Y	✎	Open	Close	Cancel	✖	⟳
☑	ℹ	2017	17-18 Enrichment	08/28/2017	05/25/2018	Y	✎	Open	Close	Cancel		⟳
☑	ℹ	2017	17-18 School Aged Child Care	08/28/2017	05/25/2018	Y	✎	Open	Close	Cancel		⟳
☑	ℹ	2017	2018 Summer	05/28/2018	08/24/2018	Y	✎	Open	Close	Cancel		⟳

Each semester/room/site pairing will have an enrollment date, if the program should display on the registration now, you will want to be sure the date range is inclusive of the day's date-



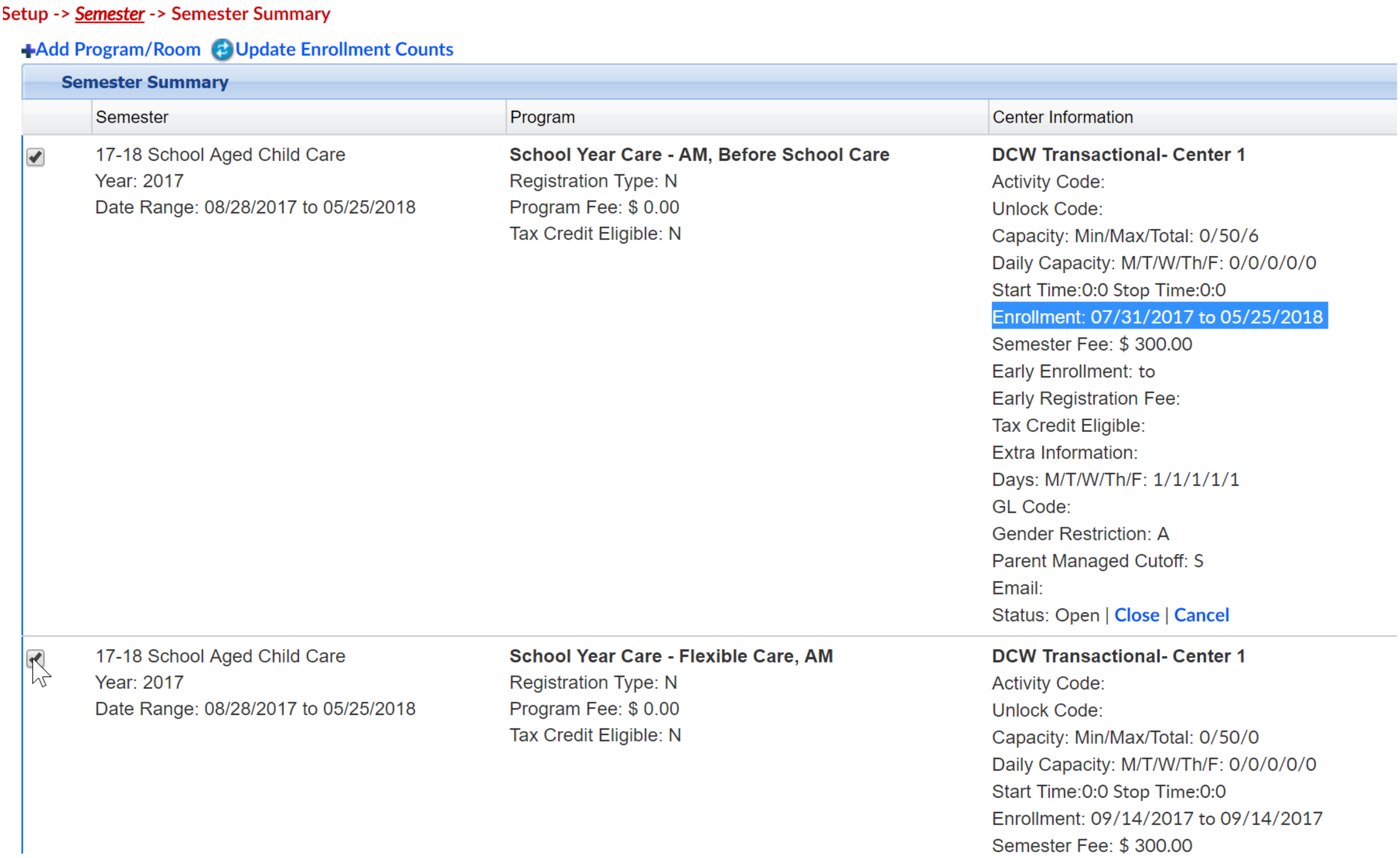
Setup -> *Semester* -> Semester Summary

+Add Program/Room Update Enrollment Counts

Semester Summary

	Semester	Program	Center Information
☐	17-18 School Aged Child Care Year: 2017 Date Range: 08/28/2017 to 05/25/2018	**School Year Care - AM, Before School Care** Registration Type: N Program Fee: $ 0.00 Tax Credit Eligible: N	**DCW Transactional- Center 1** Activity Code: Unlock Code: Capacity: Min/Max/Total: 0/50/6 Daily Capacity: M/T/W/Th/F: 0/0/0/0/0 Start Time:0:0 Stop Time:0:0 Enrollment: 07/31/2017 to 05/25/2018 Semester Fee: $ 300.00 Early Enrollment: to Early Registration Fee: Tax Credit Eligible: Extra Information: Days: M/T/W/Th/F: 1/1/1/1/1 GL Code: Gender Restriction: A Parent Managed Cutoff: S Email: Status: Open | Close | Cancel

To update one or more semester/room/site pairing select the box on the left side of the pairing



Setup -> *Semester* -> Semester Summary

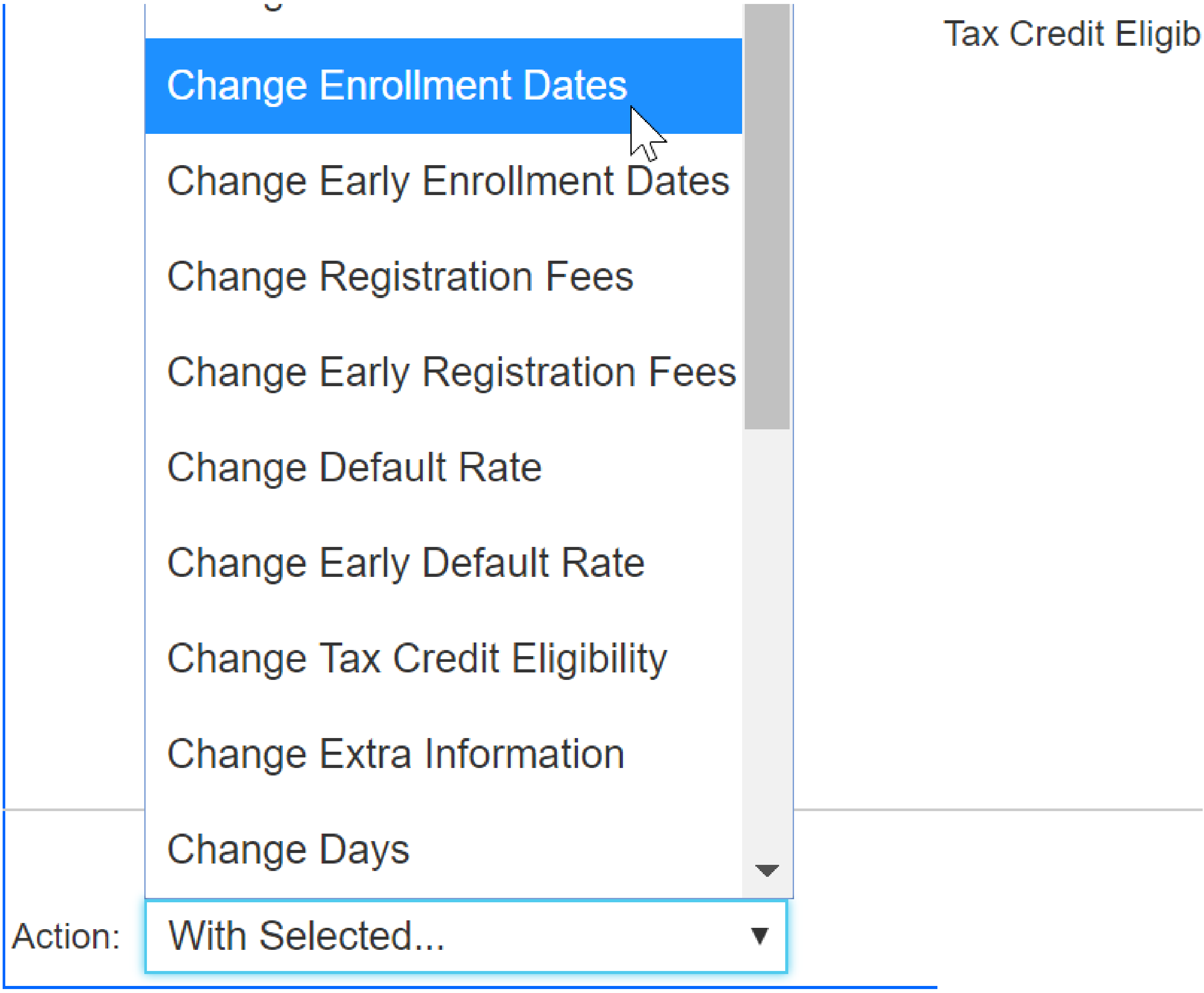
+Add Program/Room Update Enrollment Counts

Semester Summary

	Semester	Program	Center Information
☑	17-18 School Aged Child Care Year: 2017 Date Range: 08/28/2017 to 05/25/2018	**School Year Care - AM, Before School Care** Registration Type: N Program Fee: $ 0.00 Tax Credit Eligible: N	**DCW Transactional- Center 1** Activity Code: Unlock Code: Capacity: Min/Max/Total: 0/50/6 Daily Capacity: M/T/W/Th/F: 0/0/0/0/0 Start Time:0:0 Stop Time:0:0 Enrollment: 07/31/2017 to 05/25/2018 Semester Fee: $ 300.00 Early Enrollment: to Early Registration Fee: Tax Credit Eligible: Extra Information: Days: M/T/W/Th/F: 1/1/1/1/1 GL Code: Gender Restriction: A Parent Managed Cutoff: S Email: Status: Open | Close | Cancel
☑	17-18 School Aged Child Care Year: 2017 Date Range: 08/28/2017 to 05/25/2018	**School Year Care - Flexible Care, AM** Registration Type: N Program Fee: $ 0.00 Tax Credit Eligible: N	**DCW Transactional- Center 1** Activity Code: Unlock Code: Capacity: Min/Max/Total: 0/50/0 Daily Capacity: M/T/W/Th/F: 0/0/0/0/0 Start Time:0:0 Stop Time:0:0 Enrollment: 09/14/2017 to 09/14/2017 Semester Fee: $ 300.00

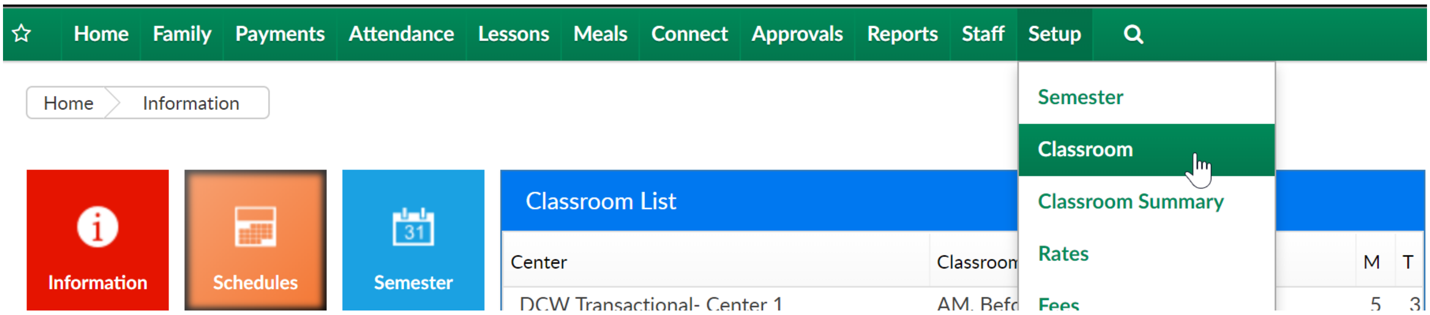
Scroll to the bottom of the page and press the actions button. Then select Change

Enrollment Dates, enter the new dates and save.

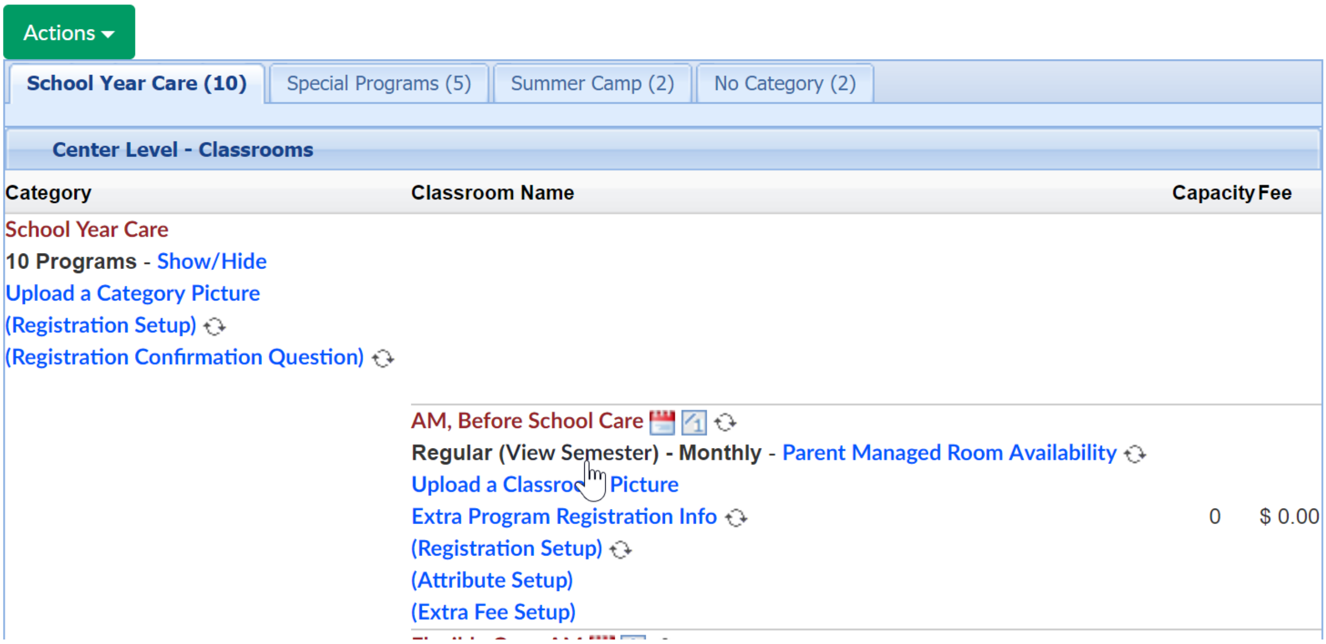


Check to see if the registration dates are correct (if dates are the same by site)-

Go to setup > room



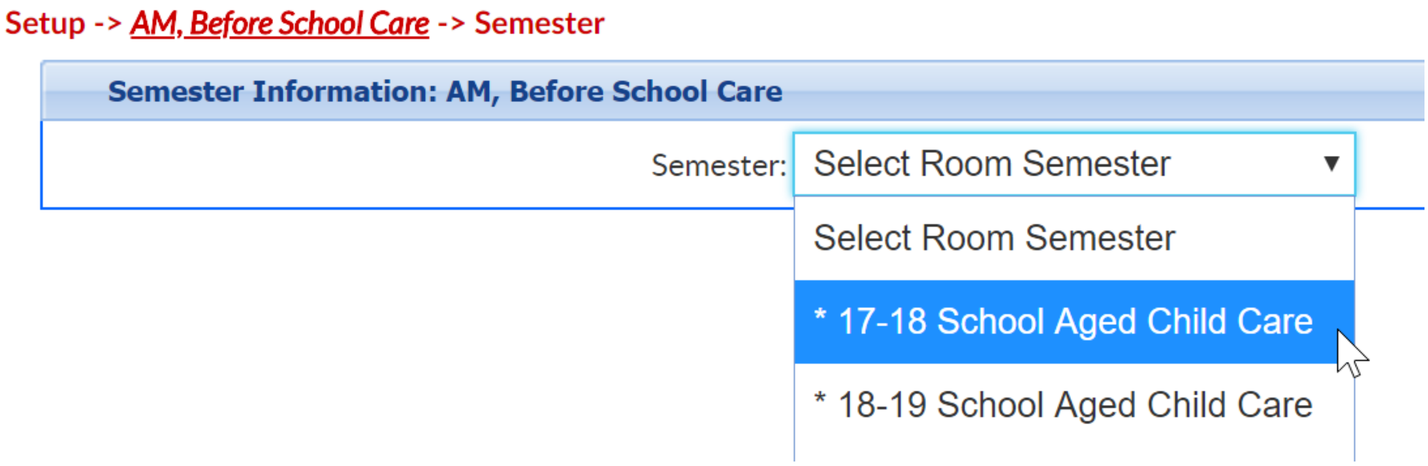
Click the view semester link under the room name-



Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Year Care 10 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

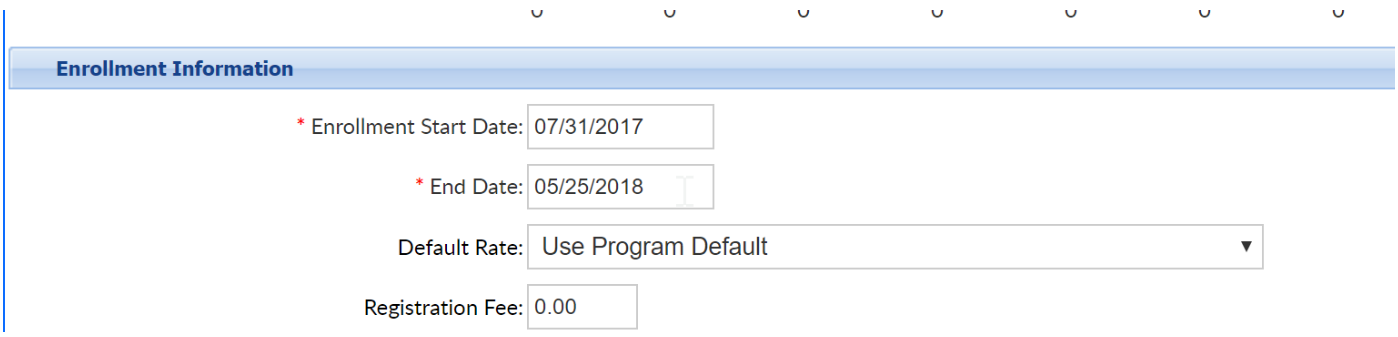
Select the semester from the drop down list-


Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: Select Room Semester

Scroll to enrollment information and verify dates, if changes are made- be sure to scroll to the bottom of the screen and press Apply to All-


Enrollment Information

* Enrollment Start Date: 07/31/2017

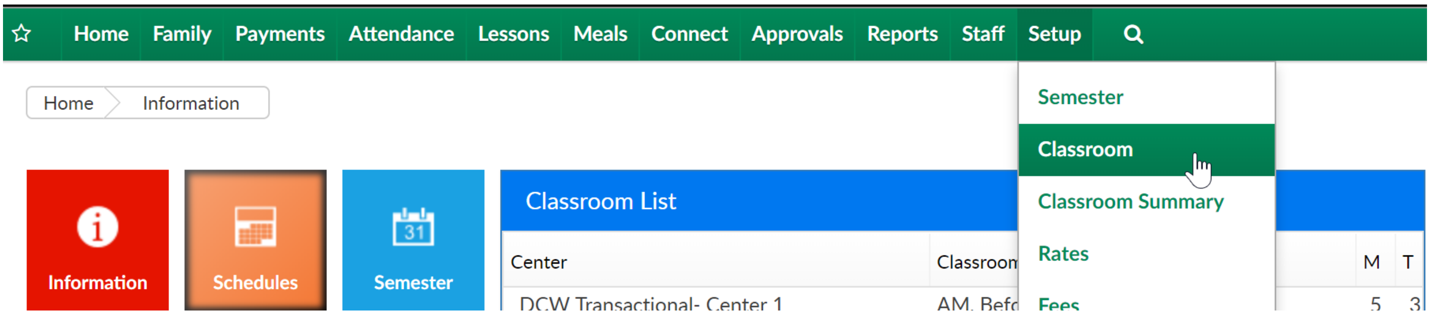
* End Date: 05/25/2018

Default Rate: Use Program Default

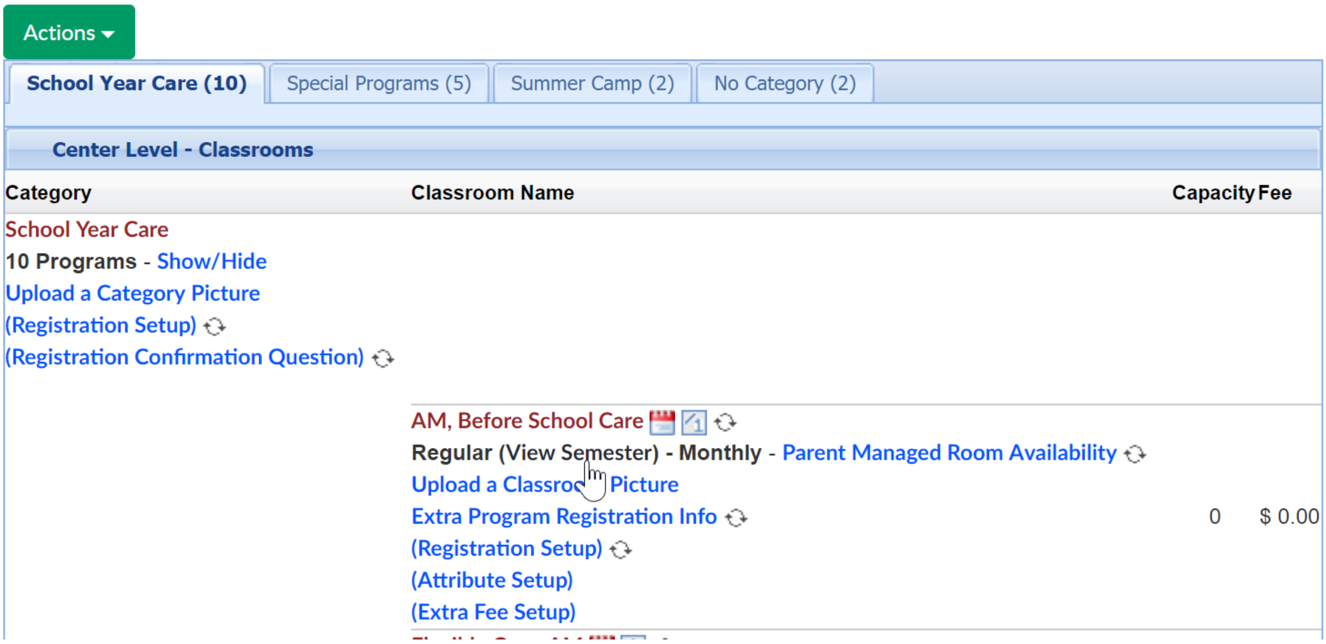
Registration Fee: 0.00

Make sure Room/Semester associations have been setup-

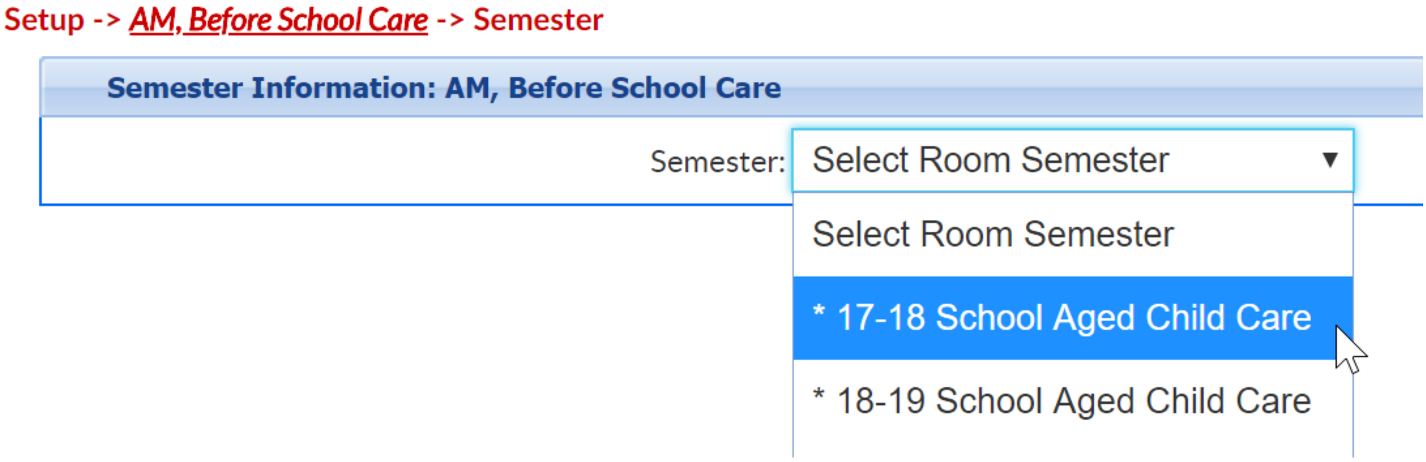
Go to setup > room



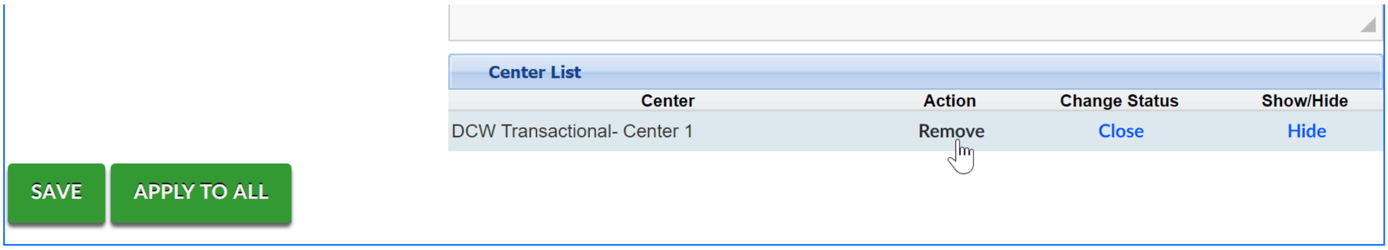
Click the view semester link under the room name-



Select the semester from the drop down list-



Scroll to the bottom of the page and ensure all sites say remove. If any sites say add, click the add button to have them display as an option for registration. Click apply to all if changes have been made.

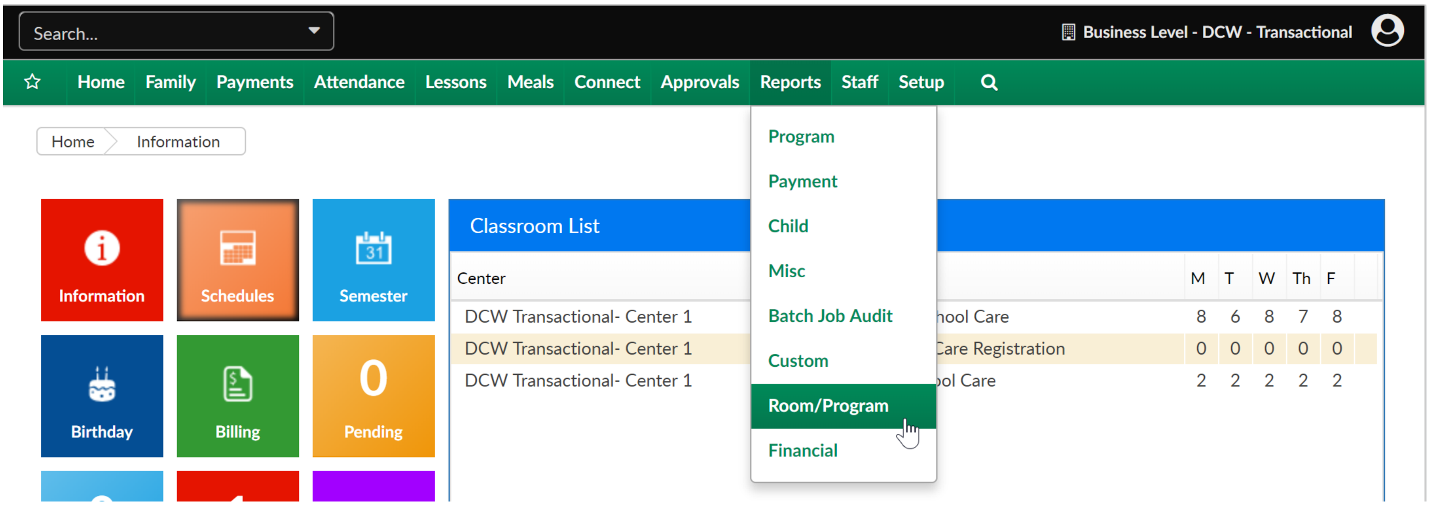


Center	Action	Change Status	Show/Hide
DCW Transactional- Center 1	Remove	Close	Hide

Reports- How do I batch pull reports for a specific program?

Last Modified on 05/15/2018 3:26 pm EDT

Go to Reports, then select Room/Program



Classroom List

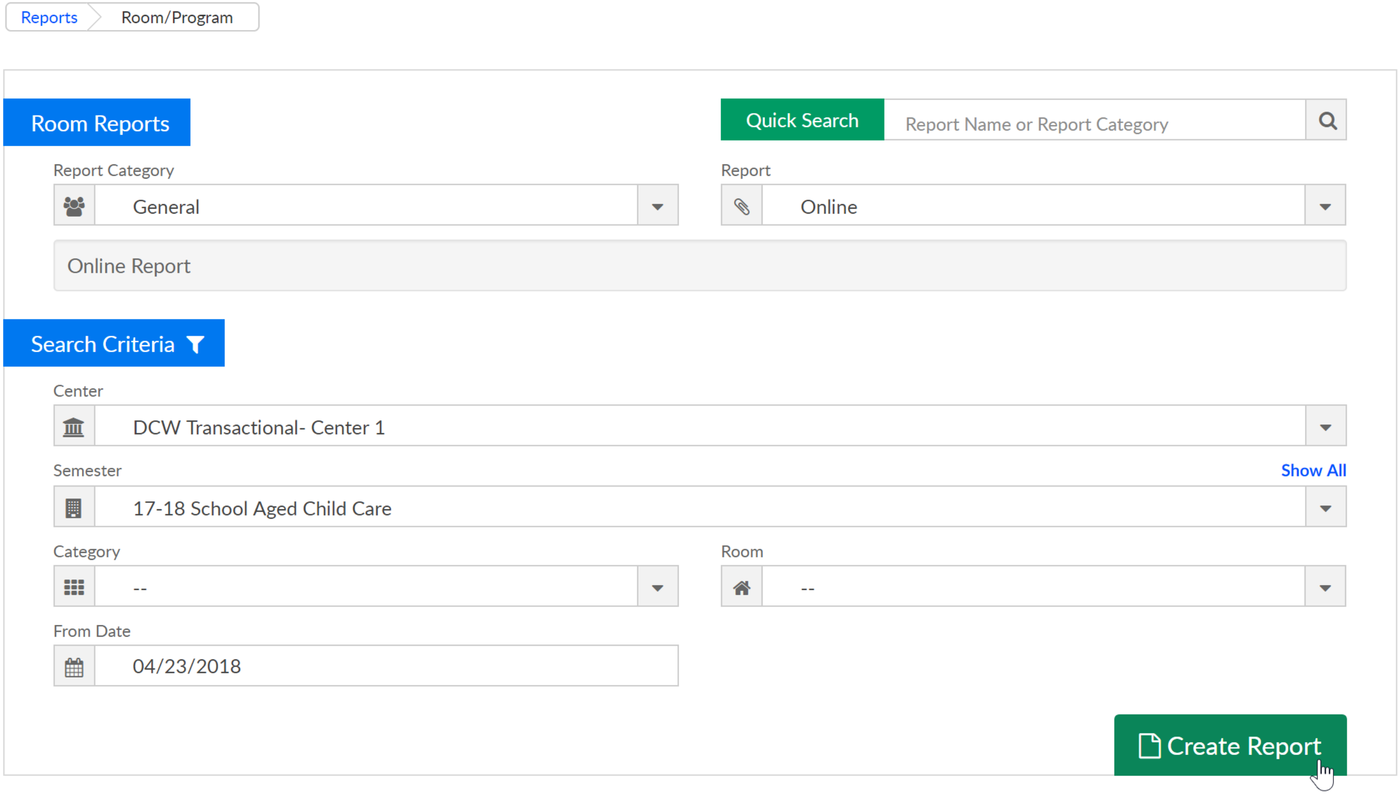
Center		M	T	W	Th	F
DCW Transactional- Center 1	hool Care	8	6	8	7	8
DCW Transactional- Center 1	Care Registration	0	0	0	0	0
DCW Transactional- Center 1	ol Care	2	2	2	2	2

In the room report section, select the General report category, then select Online in the report field.

In the search criteria, select a specific site, category or room depending on the level at which you want to batch your enrollment forms.

In the From Date field, enter the first date the children will be active in the category/room.

Then press Create Report.



Report Category: General

Report: Online

Online Report

Center: DCW Transactional- Center 1

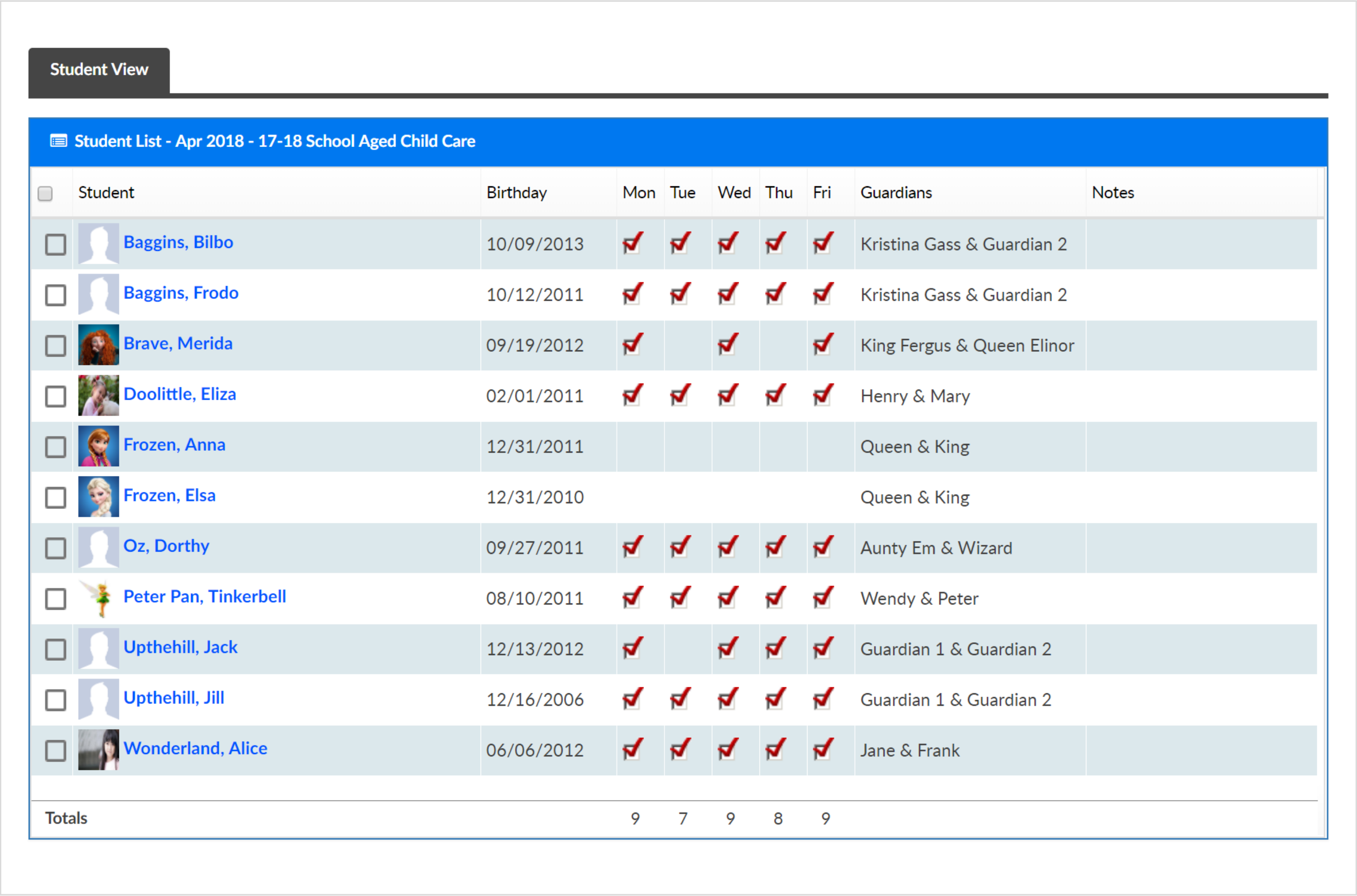
Semester: 17-18 School Aged Child Care

Category: --

Room: --

From Date: 04/23/2018

Students that match the search criteria will display in the student list-



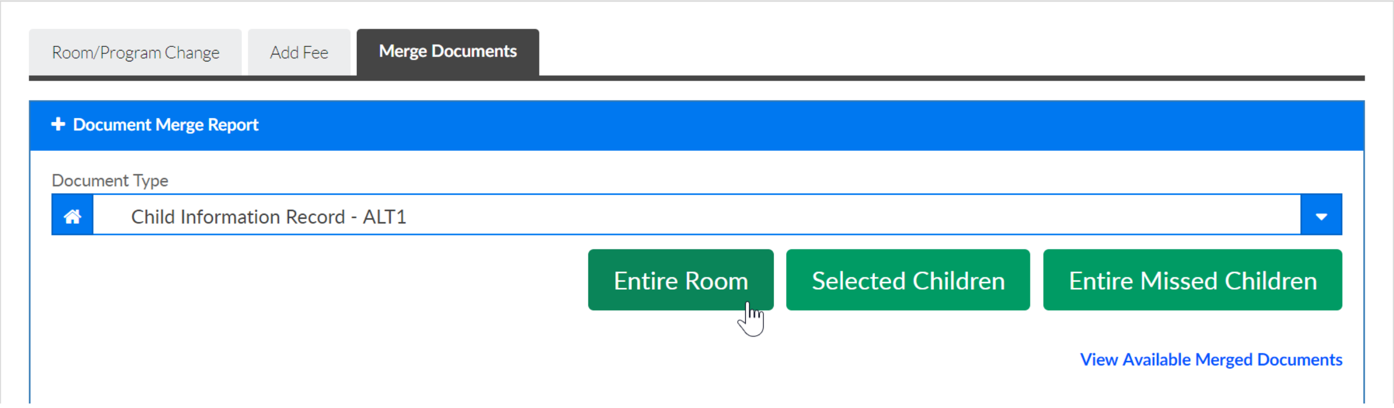
Student List - Apr 2018 - 17-18 School Aged Child Care

☐	Student	Birthday	Mon	Tue	Wed	Thu	Fri	Guardians	Notes
☐	Baggins, Bilbo	10/09/2013	✓	✓	✓	✓	✓	Kristina Gass & Guardian 2	
☐	Baggins, Frodo	10/12/2011	✓	✓	✓	✓	✓	Kristina Gass & Guardian 2	
☐	Brave, Merida	09/19/2012	✓		✓		✓	King Fergus & Queen Elinor	
☐	Doolittle, Eliza	02/01/2011	✓	✓	✓	✓	✓	Henry & Mary	
☐	Frozen, Anna	12/31/2011						Queen & King	
☐	Frozen, Elsa	12/31/2010						Queen & King	
☐	Oz, Dorthy	09/27/2011	✓	✓	✓	✓	✓	Aunty Em & Wizard	
☐	Peter Pan, Tinkerbell	08/10/2011	✓	✓	✓	✓	✓	Wendy & Peter	
☐	Upthehill, Jack	12/13/2012	✓		✓	✓	✓	Guardian 1 & Guardian 2	
☐	Upthehill, Jill	12/16/2006	✓	✓	✓	✓	✓	Guardian 1 & Guardian 2	
☐	Wonderland, Alice	06/06/2012	✓	✓	✓	✓	✓	Jane & Frank	
	Totals		9	7	9	8	9		

Scroll down and select the Merge Documents tab-

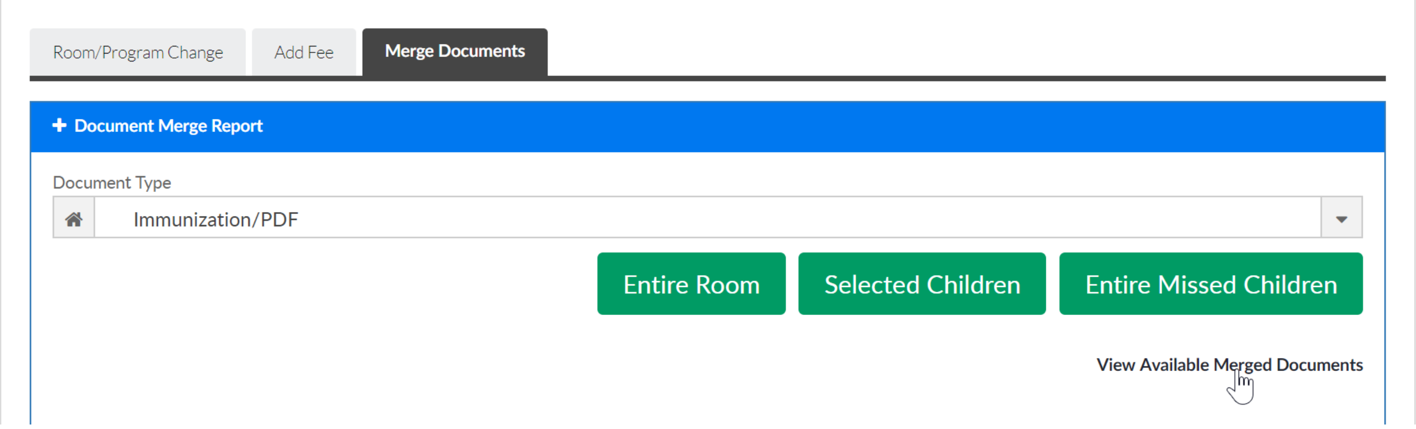
Select the document type you want to pull, then select-

- Entire Room to pull for all children display in the student list
- Selected Children if you have marked the check box next to student's names in the student list above



Document Type: Child Information Record - ALT1

Once the screen refreshes, scroll back down to the merge documents section and select the tab. Then select View Available Merged Documents-



Document Type: Immunization/PDF

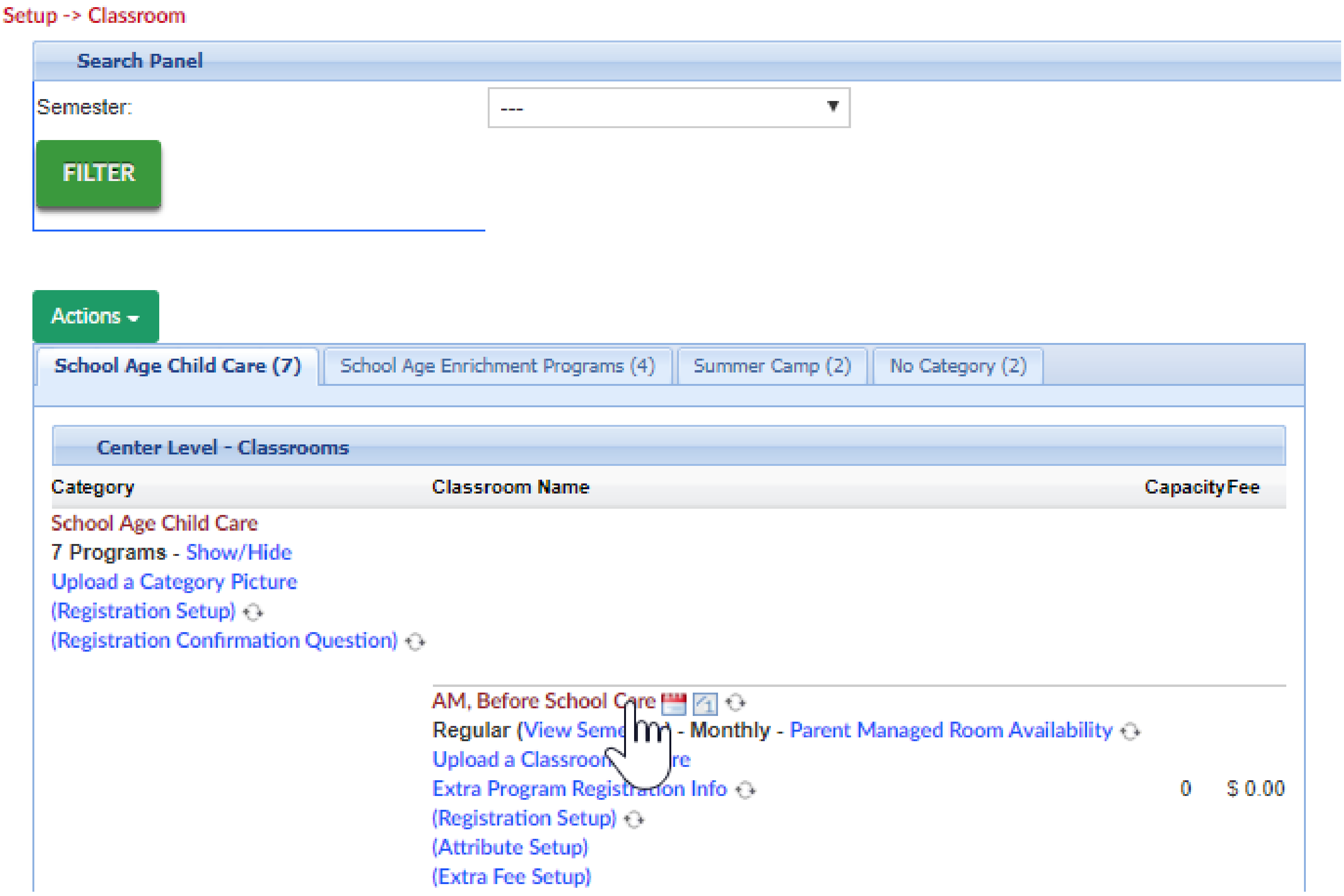
Select the document name to open the PDF file on the Document Merge List screen.

Room- How do I change capacity?

Last Modified on 02/06/2018 10:19 am EST

Room capacity can be set on several levels. It is important to remember on which level you are tracking capacities.

If capacity is added at the Room level will be the set number of children that can register for a program-


Setup -> Classroom

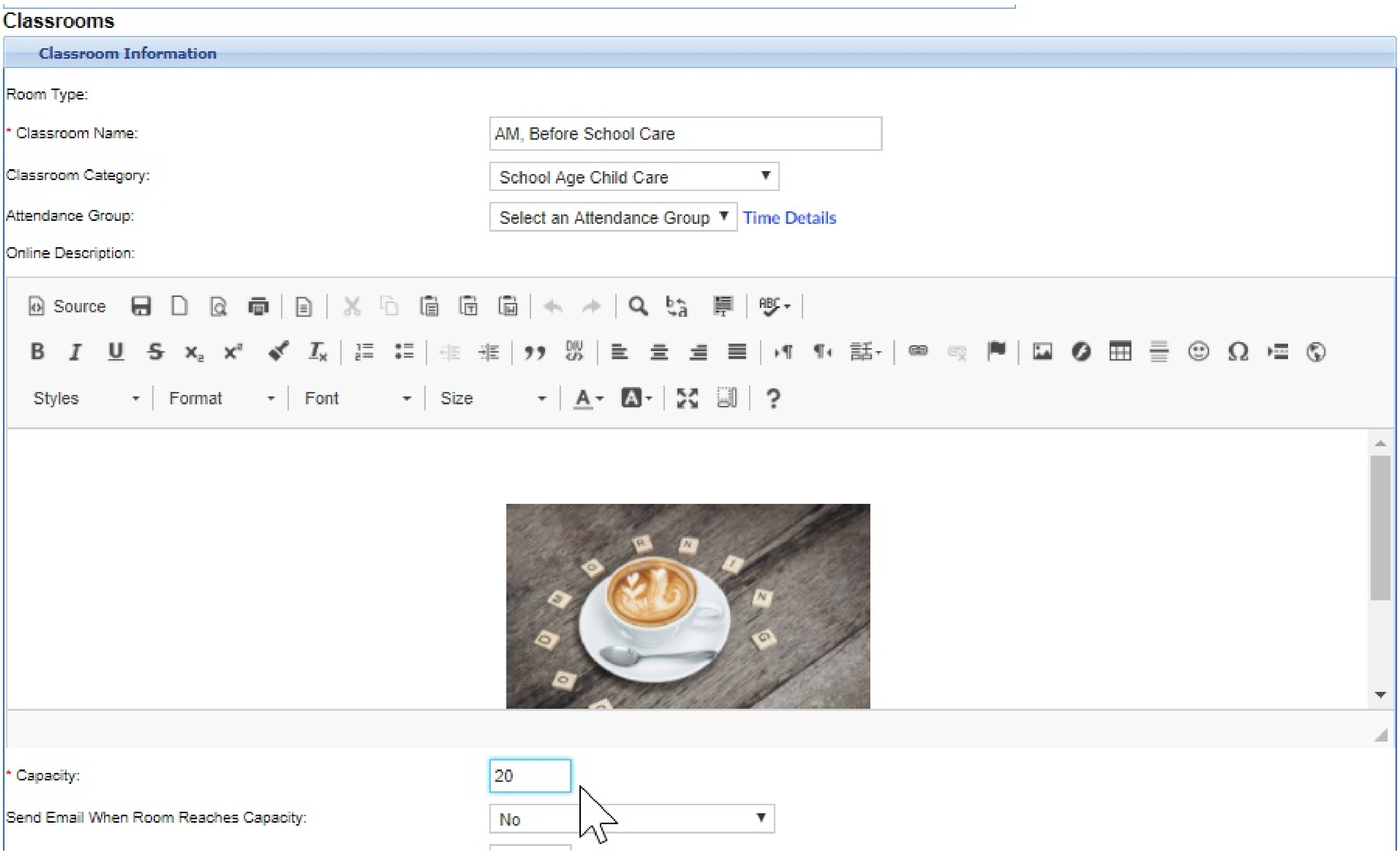
Search Panel

Semester: ---

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Age Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Seme... - Monthly - Parent Managed Room Availability Upload a Classroo... re Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

Once the room opens, enter the Capacity in the Capacity field, then scroll to the bottom of the page and save.



Classrooms

Classroom Information

Room Type:

* Classroom Name: AM, Before School Care

Classroom Category: School Age Child Care

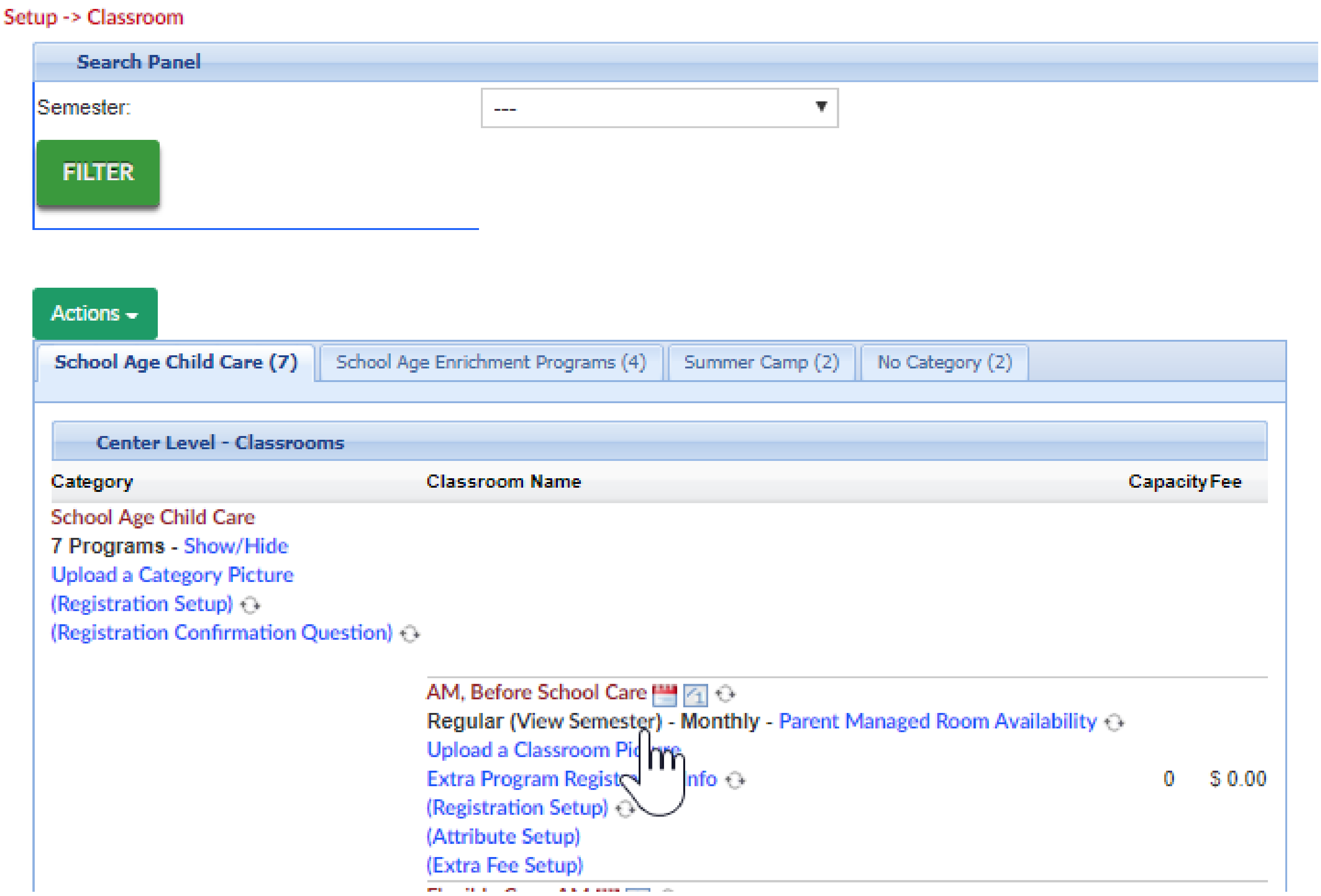
Attendance Group: Select an Attendance Group

Online Description:

* Capacity: 20

Send Email When Room Reaches Capacity: No

. If capacity is added to the room > semester level, the room > semester capacity will override the room capacity.



Setup -> Classroom

Search Panel

Semester: ---

Category: School Age Child Care

7 Programs - Show/Hide

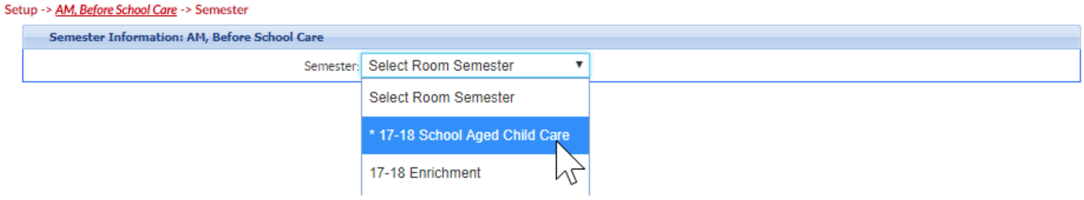
Classroom Name: AM, Before School Care

Regular (View Semester) - Monthly - Parent Managed Room Availability

Capacity: 0

Fee: $ 0.00

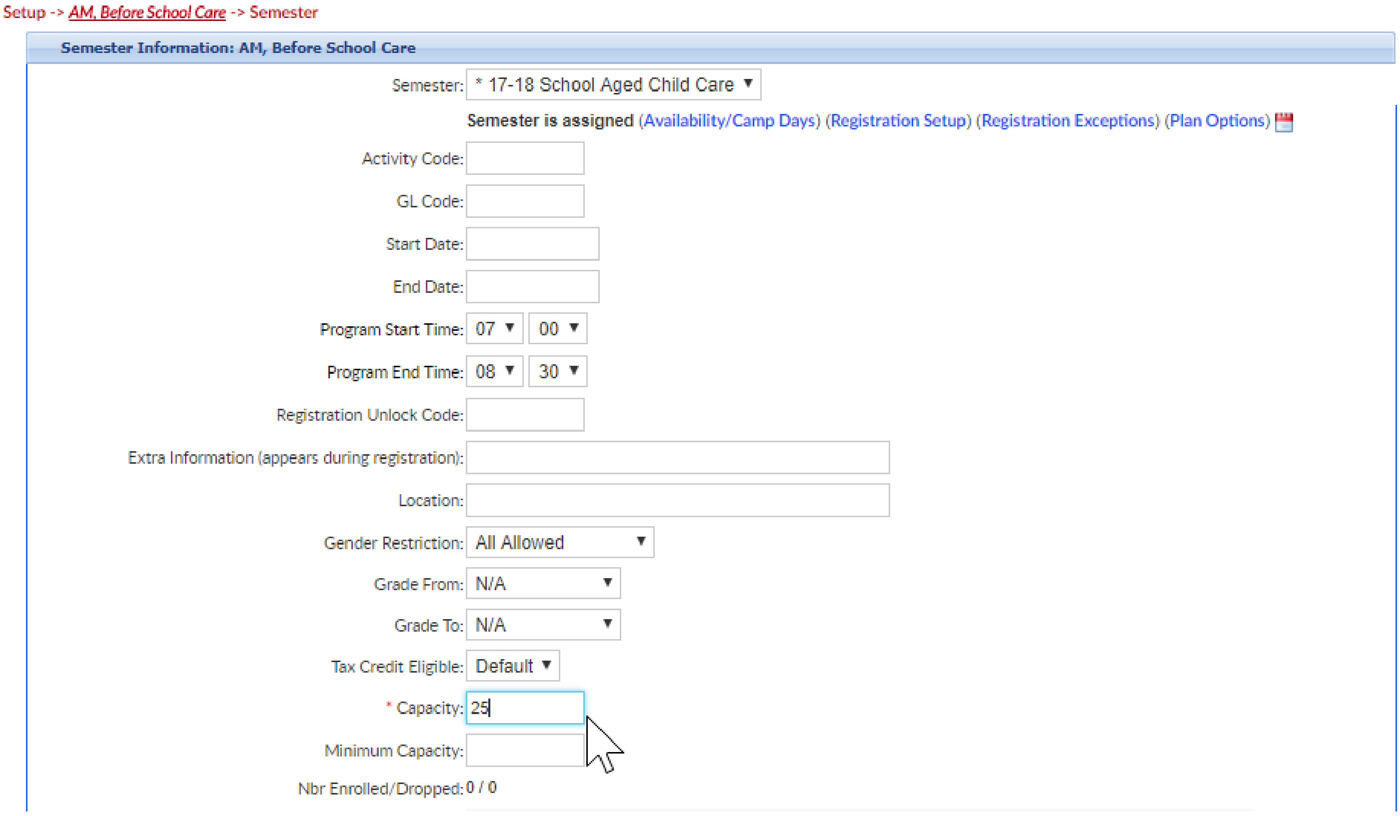
Then select the semester-


Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: Select Room Semester

Enter the capacity, then press Apply to All at the bottom of the page.


Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: * 17-18 School Aged Child Care

Semester is assigned (Availability/Camp Days) (Registration Setup) (Registration Exceptions) (Plan Options)

Activity Code:

GL Code:

Start Date:

End Date:

Program Start Time: 07 00

Program End Time: 08 30

Registration Unlock Code:

Extra Information (appears during registration):

Location:

Gender Restriction: All Allowed

Grade From: N/A

Grade To: N/A

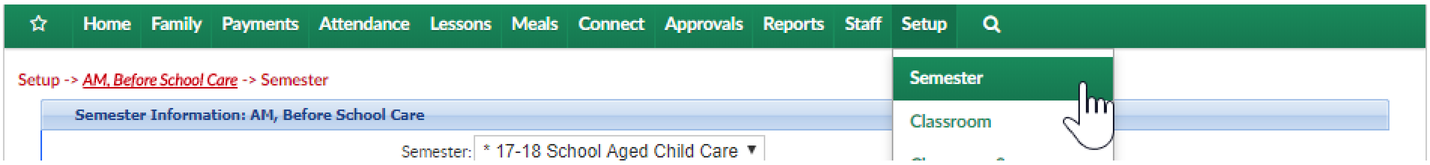
Tax Credit Eligible: Default

* Capacity: 25

Minimum Capacity:

Nbr Enrolled/Dropped: 0 / 0

If a room semester is attached to multiple sites and each site has a different capacity go to setup > semester

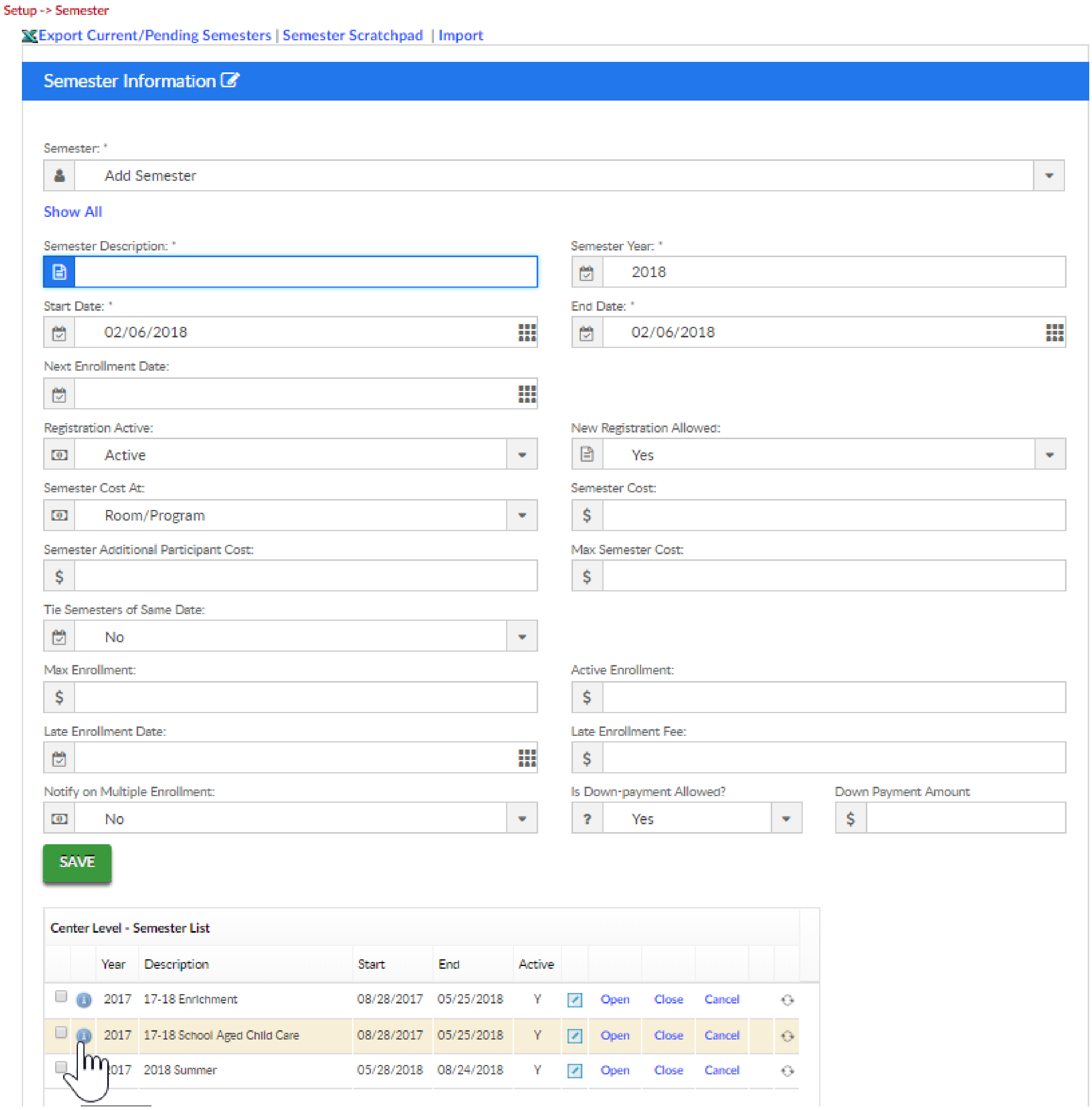


Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: * 17-18 School Aged Child Care

Then click on the blue i next to the semester name



Setup -> Semester

Export Current/Pending Semesters | Semester Scratchpad | Import

Semester Information

Semester: * Add Semester

Show All

Semester Description: *

Semester Year: * 2018

Start Date: * 02/06/2018

End Date: * 02/06/2018

Next Enrollment Date:

Registration Active: Active

New Registration Allowed: Yes

Semester Cost At: Room/Program

Semester Cost: $

Semester Additional Participant Cost: $

Max Semester Cost: $

Tie Semesters of Same Date: No

Max Enrollment: $

Active Enrollment: $

Late Enrollment Date:

Late Enrollment Fee: $

Notify on Multiple Enrollment: No

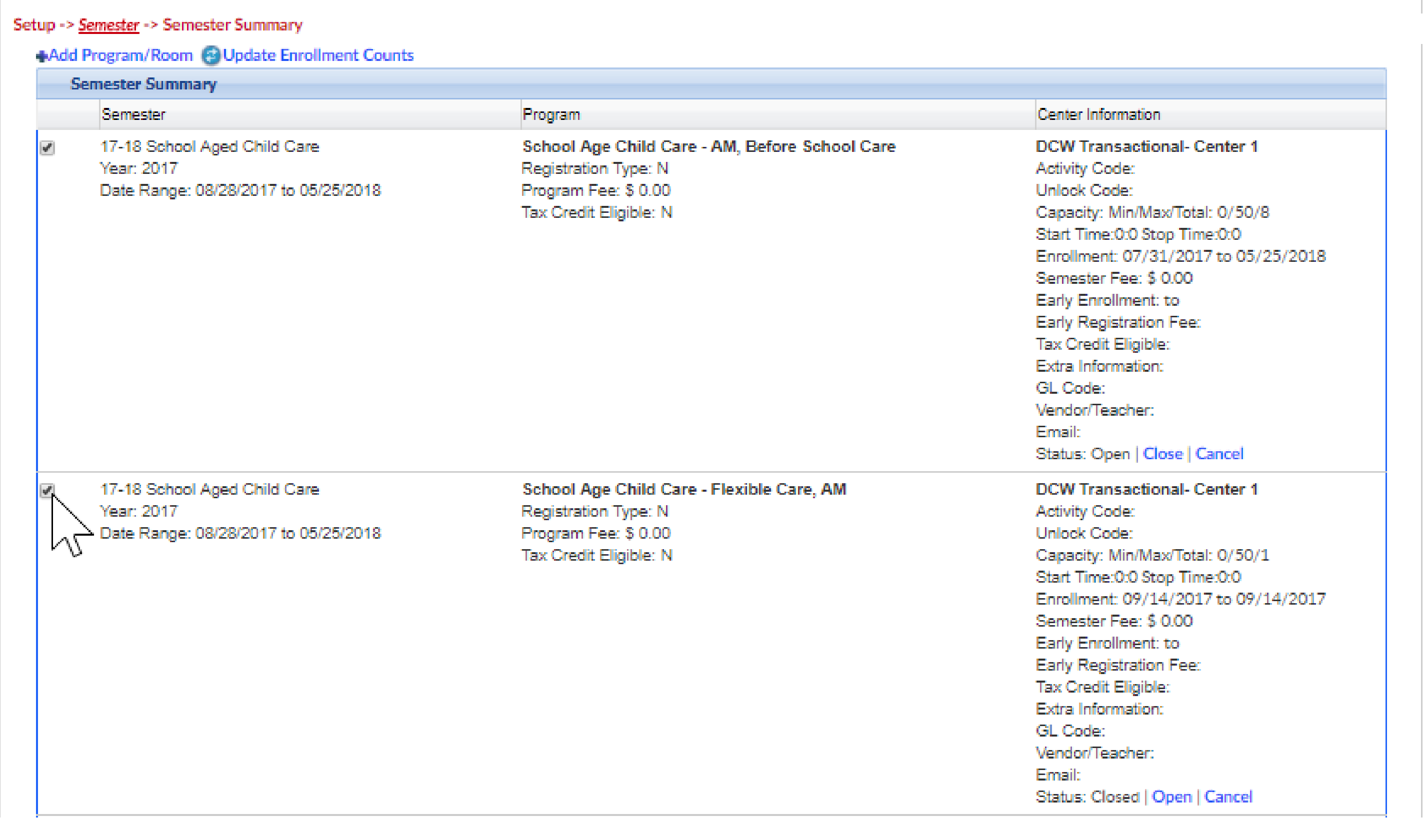
Is Down-payment Allowed? Yes

Down Payment Amount $

Center Level - Semester List

		Year	Description	Start	End	Active					
☐	ⓘ	2017	17-18 Enrichment	08/28/2017	05/25/2018	Y	✓	Open	Close	Cancel	⊕
☐	ⓘ	2017	17-18 School Aged Child Care	08/28/2017	05/25/2018	Y	✓	Open	Close	Cancel	⊕
☐		017	2018 Summer	05/28/2018	08/24/2018	Y	✓	Open	Close	Cancel	⊕

Select the site by checking the box next to the semester/room/site association

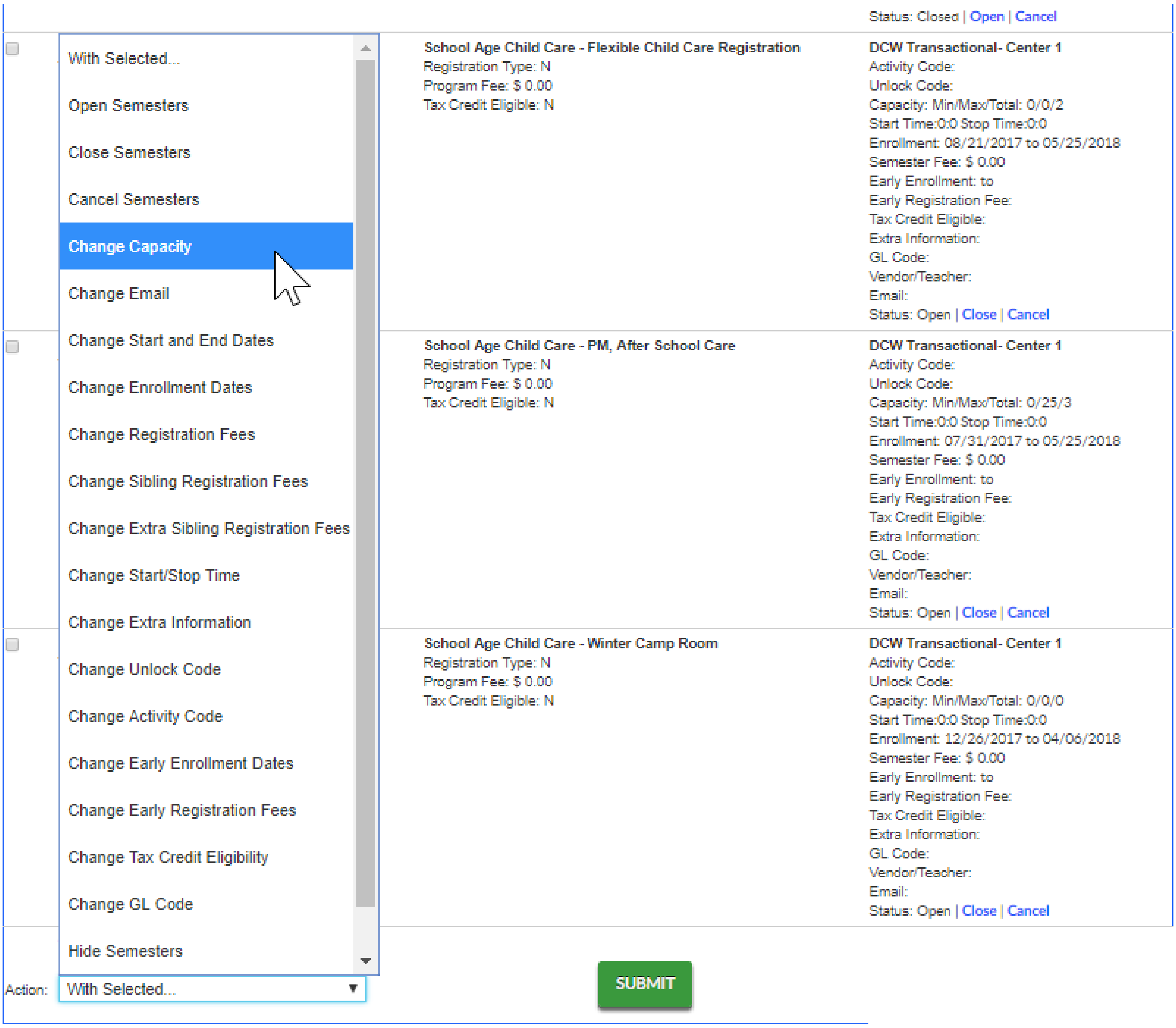


Setup -> Semester -> Semester Summary

Semester Summary

	Semester	Program	Center Information
☑	17-18 School Aged Child Care Year: 2017 Date Range: 08/28/2017 to 05/25/2018	**School Age Child Care - AM, Before School Care** Registration Type: N Program Fee: $ 0.00 Tax Credit Eligible: N	**DCW Transactional- Center 1** Activity Code: Unlock Code: Capacity: Min/Max/Total: 0/50/8 Start Time:0:0 Stop Time:0:0 Enrollment: 07/31/2017 to 05/25/2018 Semester Fee: $ 0.00 Early Enrollment: to Early Registration Fee: Tax Credit Eligible: Extra Information: GL Code: Vendor/Teacher: Email: Status: Open | Close | Cancel
☑	17-18 School Aged Child Care Year: 2017 Date Range: 08/28/2017 to 05/25/2018	**School Age Child Care - Flexible Care, AM** Registration Type: N Program Fee: $ 0.00 Tax Credit Eligible: N	**DCW Transactional- Center 1** Activity Code: Unlock Code: Capacity: Min/Max/Total: 0/50/1 Start Time:0:0 Stop Time:0:0 Enrollment: 09/14/2017 to 09/14/2017 Semester Fee: $ 0.00 Early Enrollment: to Early Registration Fee: Tax Credit Eligible: Extra Information: GL Code: Vendor/Teacher: Email: Status: Closed | Open | Cancel

Go to the actions menu and select the option to change capacity



Status: Closed | Open | Cancel

☐ **School Age Child Care - Flexible Child Care Registration**
Registration Type: N
Program Fee: $ 0.00
Tax Credit Eligible: N

DCW Transactional- Center 1
Activity Code:
Unlock Code:
Capacity: Min/Max/Total: 0/0/2
Start Time:0:0 Stop Time:0:0
Enrollment: 08/21/2017 to 05/25/2018
Semester Fee: $ 0.00
Early Enrollment: to
Early Registration Fee:
Tax Credit Eligible:
Extra Information:
GL Code:
Vendor/Teacher:
Email:
Status: Open | Close | Cancel

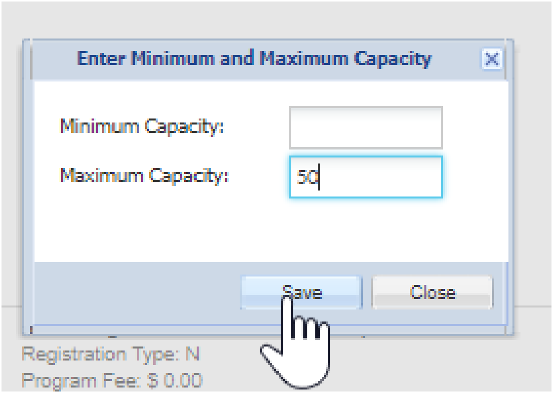
☐ **School Age Child Care - PM, After School Care**
Registration Type: N
Program Fee: $ 0.00
Tax Credit Eligible: N

DCW Transactional- Center 1
Activity Code:
Unlock Code:
Capacity: Min/Max/Total: 0/25/3
Start Time:0:0 Stop Time:0:0
Enrollment: 07/31/2017 to 05/25/2018
Semester Fee: $ 0.00
Early Enrollment: to
Early Registration Fee:
Tax Credit Eligible:
Extra Information:
GL Code:
Vendor/Teacher:
Email:
Status: Open | Close | Cancel

☐ **School Age Child Care - Winter Camp Room**
Registration Type: N
Program Fee: $ 0.00
Tax Credit Eligible: N

DCW Transactional- Center 1
Activity Code:
Unlock Code:
Capacity: Min/Max/Total: 0/0/0
Start Time:0:0 Stop Time:0:0
Enrollment: 12/26/2017 to 04/06/2018
Semester Fee: $ 0.00
Early Enrollment: to
Early Registration Fee:
Tax Credit Eligible:
Extra Information:
GL Code:
Vendor/Teacher:
Email:
Status: Open | Close | Cancel

Enter capacity and then press save



Minimum Capacity:
Maximum Capacity: 50

Registration Type: N
Program Fee: $ 0.00

Note: if you change capacity at the setup > semester, semester summary level you will not want to press APPLY to ALL on the room/semester association under setup > classroom, classroom name, view semester- if APPLY to ALL is selected the semester summary settings will be overridden.

Room- How do I change the enrollment dates on my room?

Last Modified on 06/28/2018 3:25 pm EDT

Enrollment dates are set at the Room/Semester level and control when a family can register their children for room/programs.

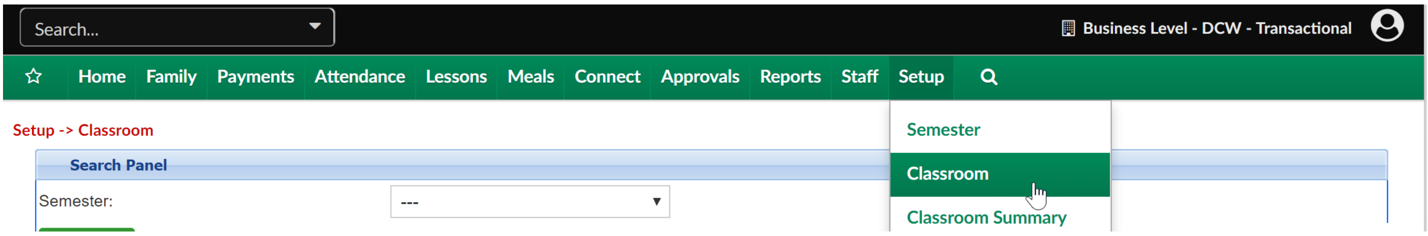
There are two main locations these dates can be updated-

- Overall by Room/Semester association under Setup > Room, (View Semester) link
- Individual Site/Semester/Room enrollment dates can be adjusted on the Setup > Semester, Semester Summary page.

Room- How do I change the start/end dates on my room?

Last Modified on 04/13/2018 8:33 am EDT

To change the start/end date of a program- the days the program will actually be held- go to the Setup > Room screen.

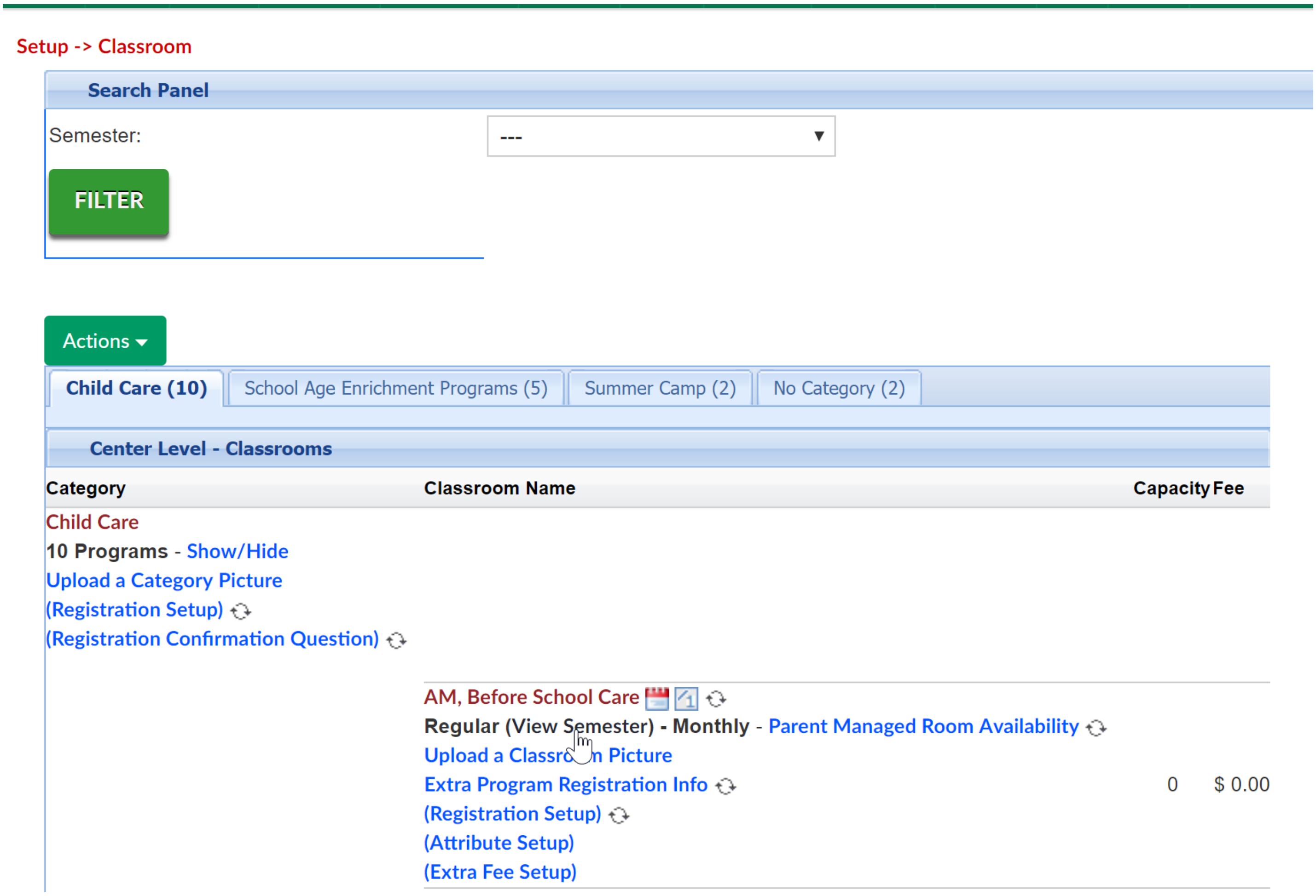


Setup -> Classroom

Search Panel

Semester: ---

Under the name of the room/program select the (View Semester) link-



Setup -> Classroom

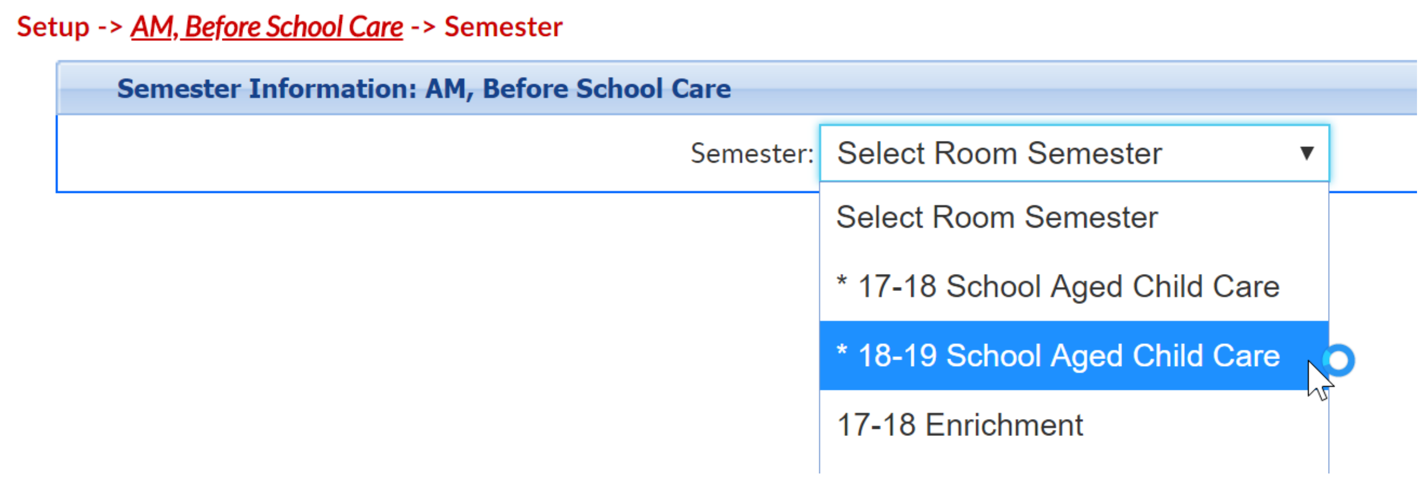
Search Panel

Semester: ---

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
Child Care 10 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

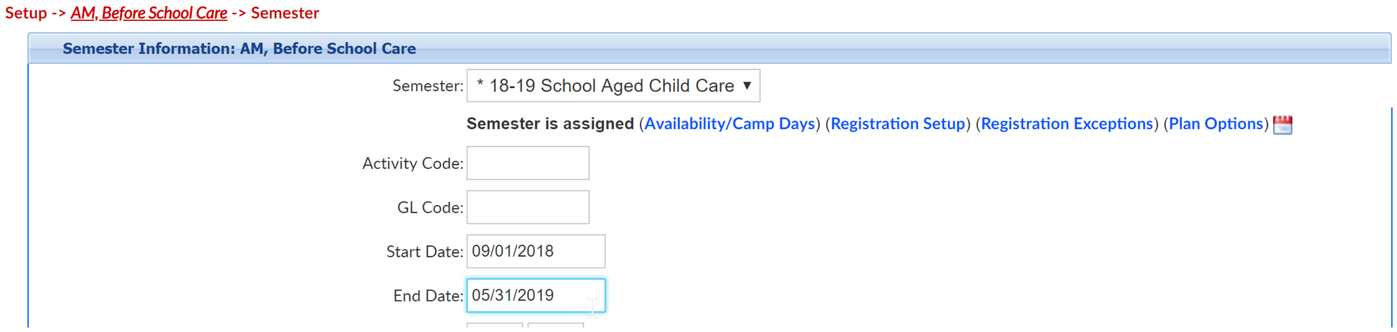
Select the semester's date you want to adjust for the program-


Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: Select Room Semester ▼

Enter the start and end date in the fields below, then scroll to the bottom of the page and press Apply to All at the bottom of the page.


Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

Semester: * 18-19 School Aged Child Care ▼

Semester is assigned (Availability/Camp Days) (Registration Setup) (Registration Exceptions) (Plan Options)

Activity Code:

GL Code:

Start Date: 09/01/2018

End Date: 05/31/2019

Editing the dates at this level will adjust the start date and end date for all sites the room/semester is associated with.

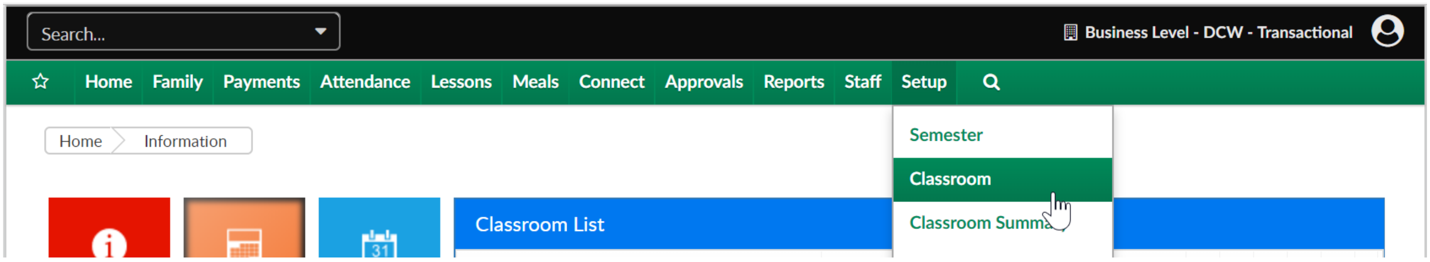
If sites have different program start/end dates the start and end dates should be adjusted at the semester summary level.

Room- How do I open/close a room for registration?

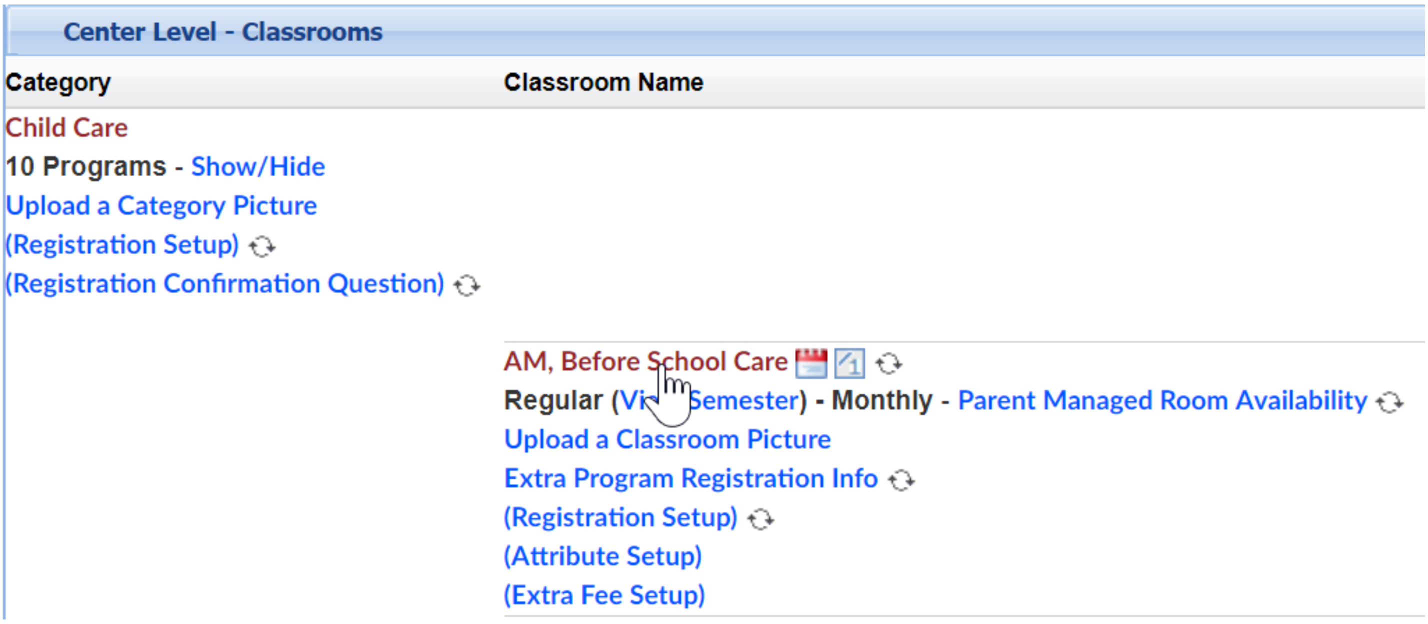
Last Modified on 06/28/2018 3:27 pm EDT

In order for a room to appear on registration it must be attached to a semester.

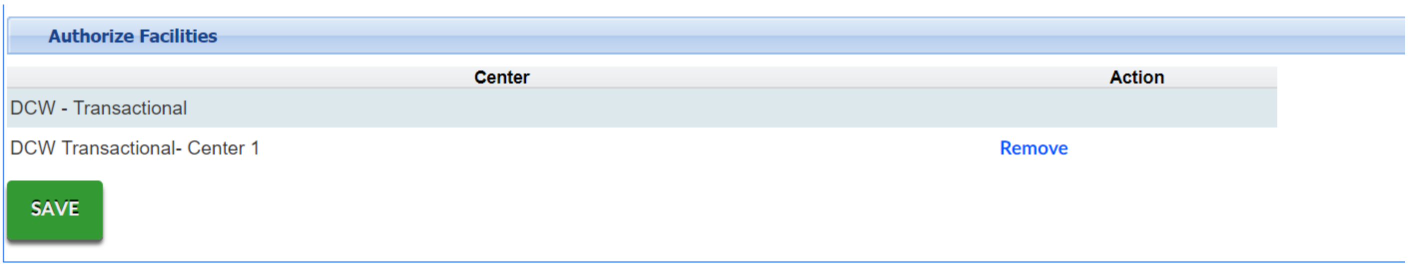
Rooms must be attached to at least one center to view the sites a room is attached to go to the Setup > Room screen-



Click on the room name-

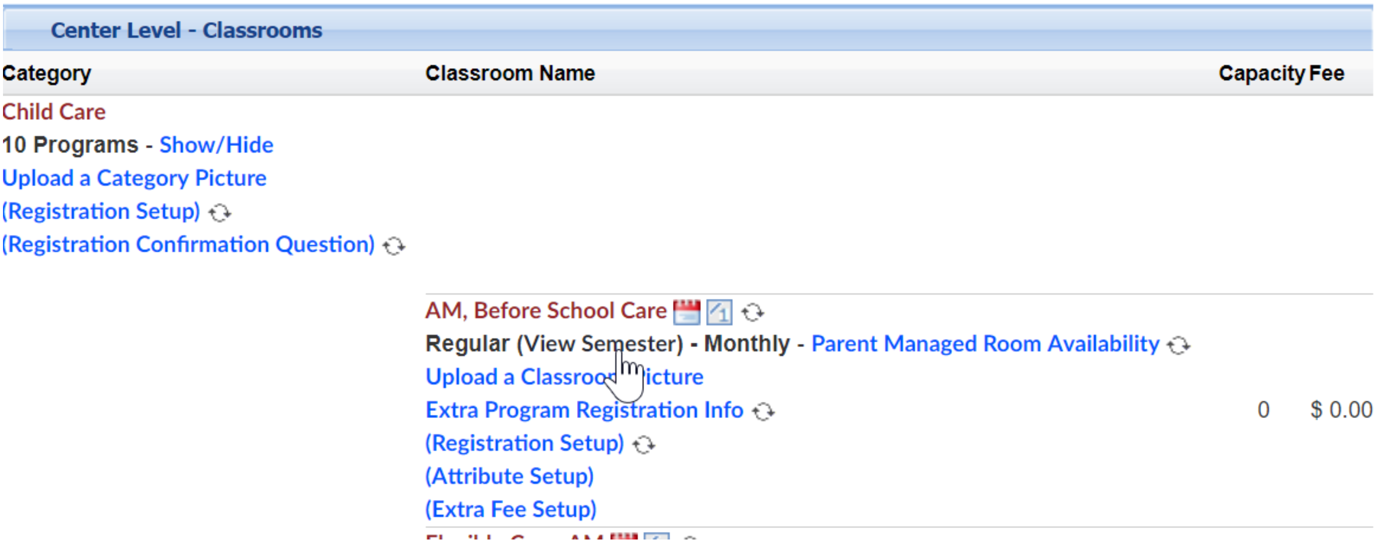


Then scroll to the bottom of the page and review the Authorize Facilities section-



Center	Action
DCW - Transactional	
DCW Transactional- Center 1	Remove

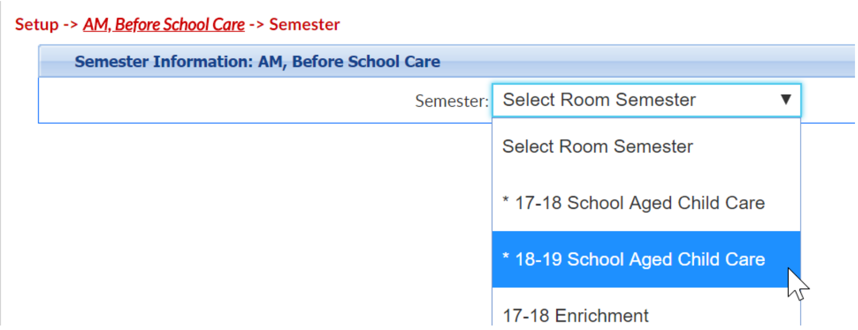
Once a room has been attached to at least one center, go to setup > room page and click on the (view semester) link under the room's name.



Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
Child Care 10 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00

Select the semester that will be updated from the drop down box-



Setup -> AM, Before School Care -> Semester

Semester Information: AM, Before School Care

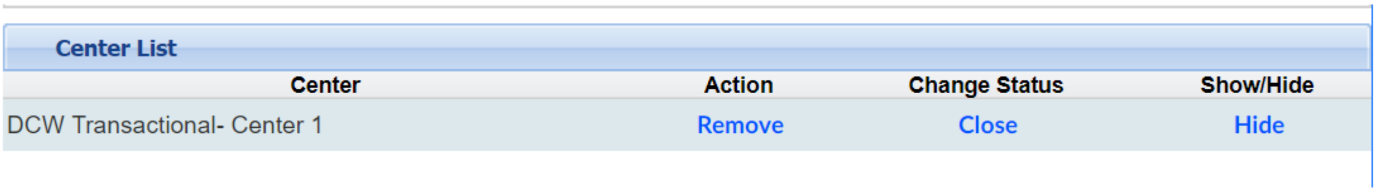
Semester: Select Room Semester ▼

- Select Room Semester
- * 17-18 School Aged Child Care
- * 18-19 School Aged Child Care
- 17-18 Enrichment

On the Room/Semester screen the below fields will impact if a room will display on registration-

- Enrollment Start Date
- End Date
- Full Registration Online- checked
- Registration Online- set to yes

Be sure the correct centers are selected in the center list. If you want the room to display as open for registration according to the start/end dates be sure your centers look like this-



Center List

Center	Action	Change Status	Show/Hide
DCW Transactional- Center 1	Remove	Close	Hide

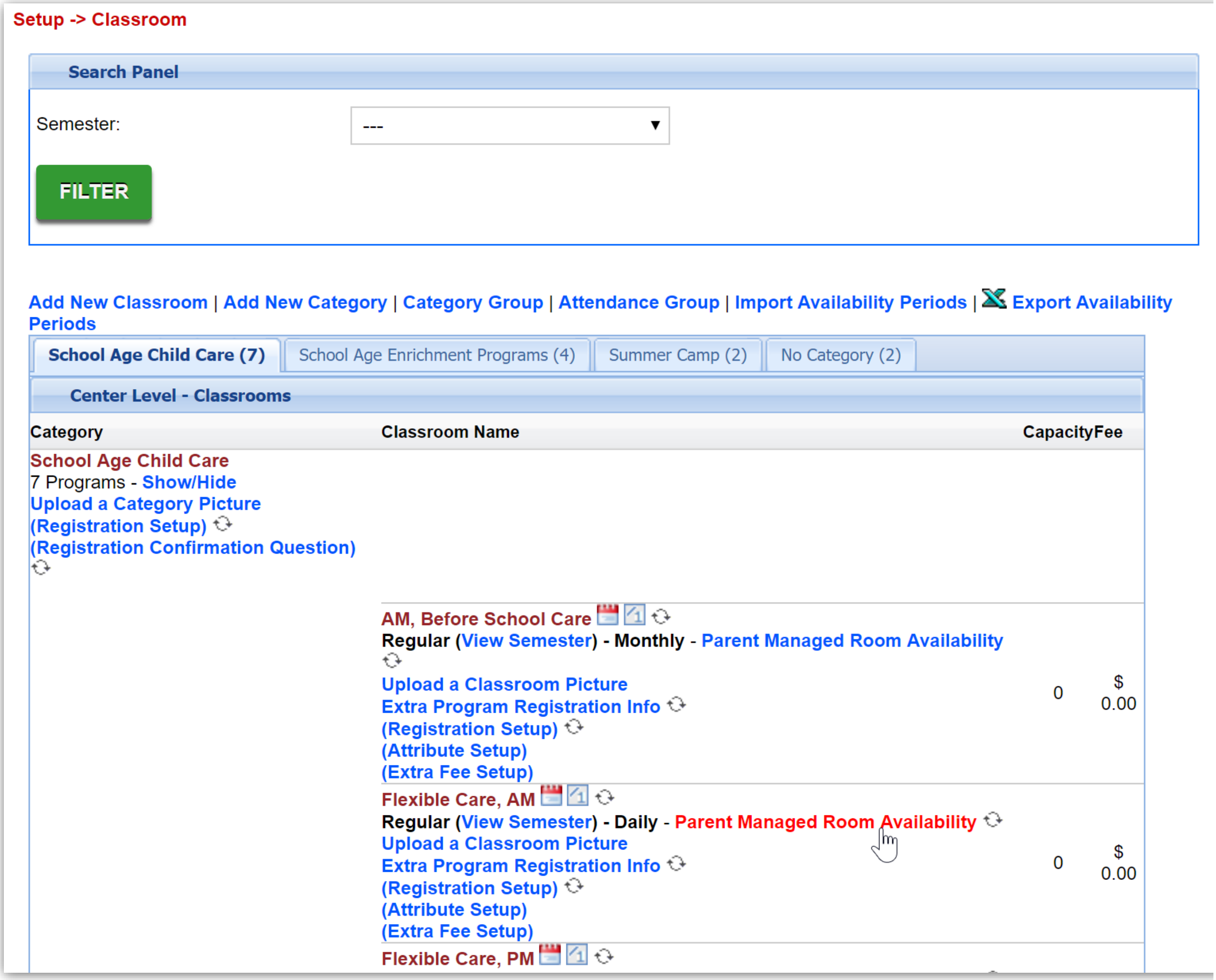
Be sure to select Apply to All when making changes on the room semester screen. By selecting Apply to All you are saying you want to copy all of your settings from the business level to your center levels.

Individual detail can also be adjusted by going to the semester summary screen.

Room- How do I get days to show up on my parent managed calendar?

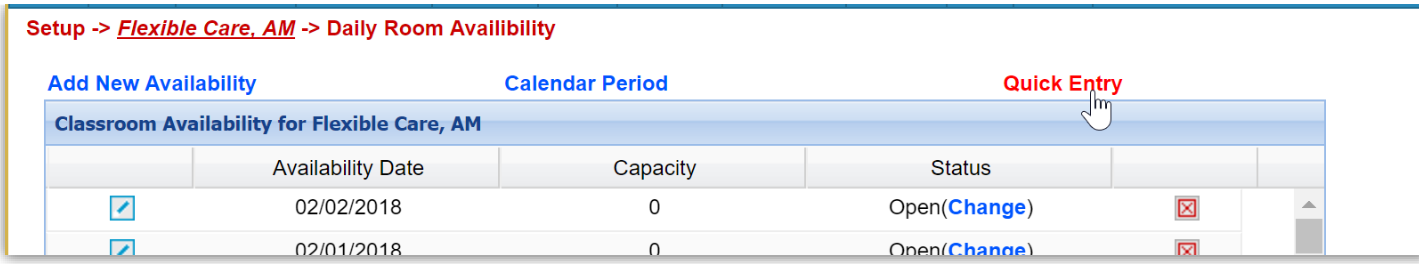
Last Modified on 06/17/2018 11:08 pm EDT

Once the Registration and Calendar rooms have been created days for selection must be added to the parent managed calendar room. To add days select the Parent Managed Availability link next to the calendar room name. Once availability has been added, it can be cloned to other parent managed calendars by selecting the circle icon next to the Parent Managed Availability link.



Category	Classroom Name	Capacity	Fee
School Age Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, AM Regular (View Semester) - Daily - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, PM		

Select Quick Entry from the top menu, and check off the days for each month that parents should be able to select for each calendar room.



Setup -> *Flexible Care, AM* -> Daily Room Availibility

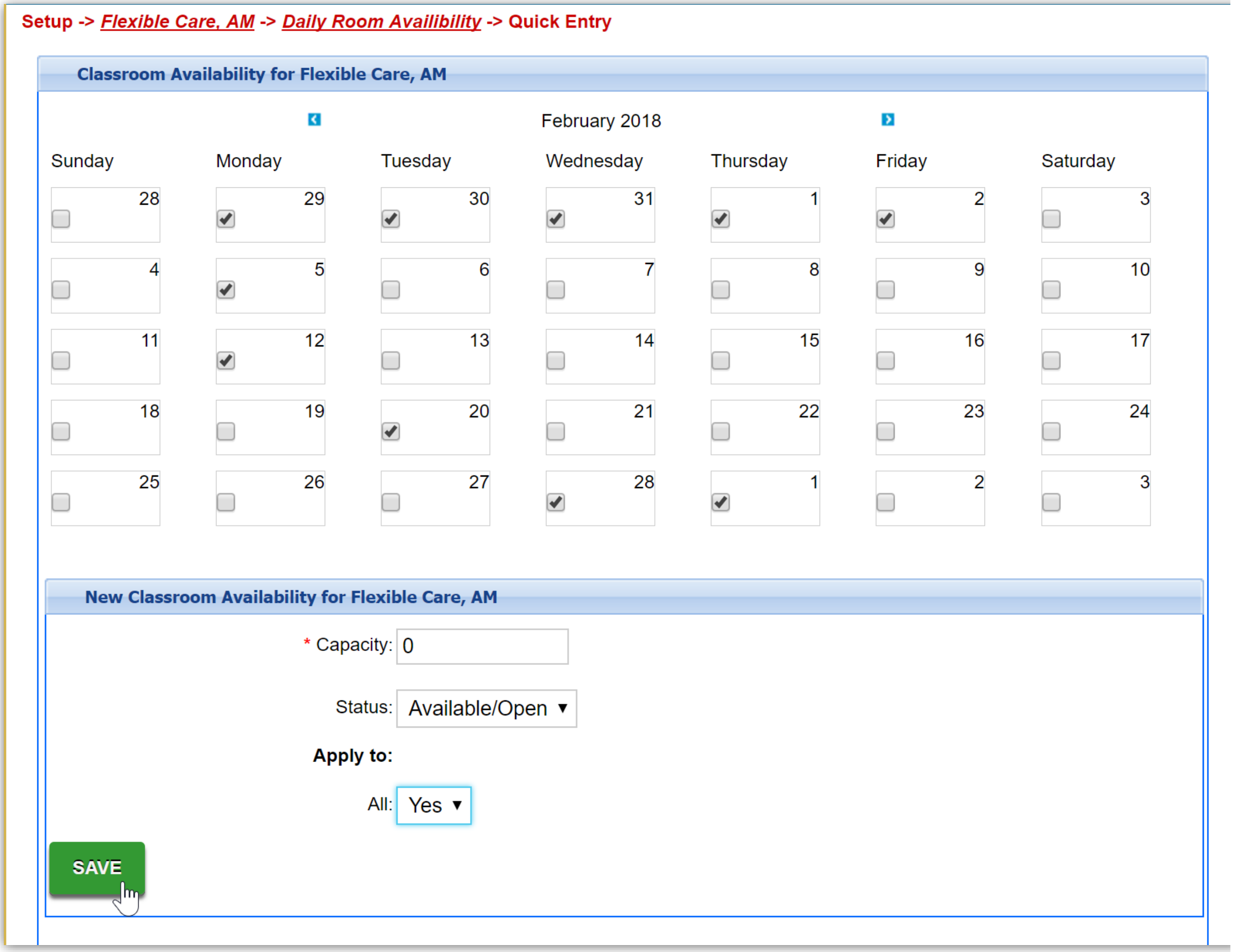
Classroom Availability for Flexible Care, AM

	Availability Date	Capacity	Status	
	02/02/2018	0	Open(Change)	☒
	02/01/2018	0	Open(Change)	☒

Once days have been selected, enter-

- Capacity - the number of kids that can register for each day (0 means unlimited)\
- Status- is the day open or closed
- Apply to All- must be set to Yes

Then select Save.



Setup -> *Flexible Care, AM* -> *Daily Room Availibility* -> Quick Entry

Classroom Availability for Flexible Care, AM

February 2018

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28 ☐	29 ☑	30 ☑	31 ☑	1 ☑	2 ☑	3 ☐
4 ☐	5 ☑	6 ☐	7 ☐	8 ☐	9 ☐	10 ☐
11 ☐	12 ☑	13 ☐	14 ☐	15 ☐	16 ☐	17 ☐
18 ☐	19 ☐	20 ☑	21 ☐	22 ☐	23 ☐	24 ☐
25 ☐	26 ☐	27 ☐	28 ☑	1 ☑	2 ☐	3 ☐

New Classroom Availability for Flexible Care, AM

* Capacity: 0

Status: Available/Open

Apply to:

All: Yes

Tips: If days are not displaying to parents on the schedule tab of the parent portal-

- Be sure the calendar registration dates on the semester level have been set.

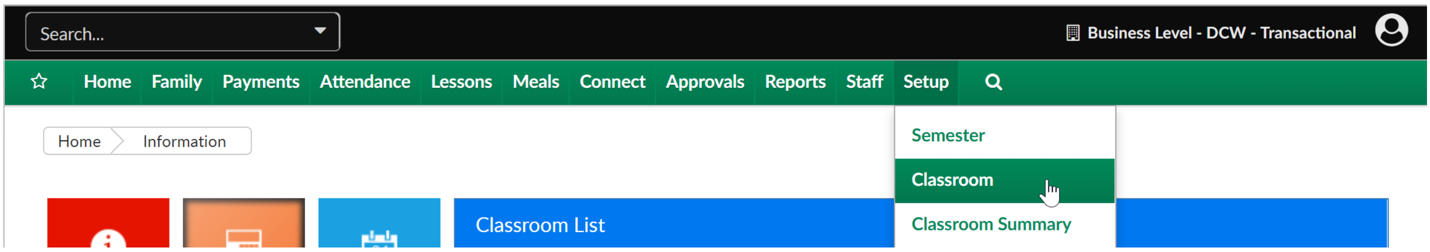
- Be sure to check that Allow Calendar Selection has been marked as YES on both the Calendar and Registration rooms- Go to setup > room, click on calendar and registration room names then scroll to field.
- Check the Family Managed Calendar - Show Combined: setting on the Setup > System Config, Registration screen is set to yes.

Room- How do I add a photo or link to a description or finishing text?

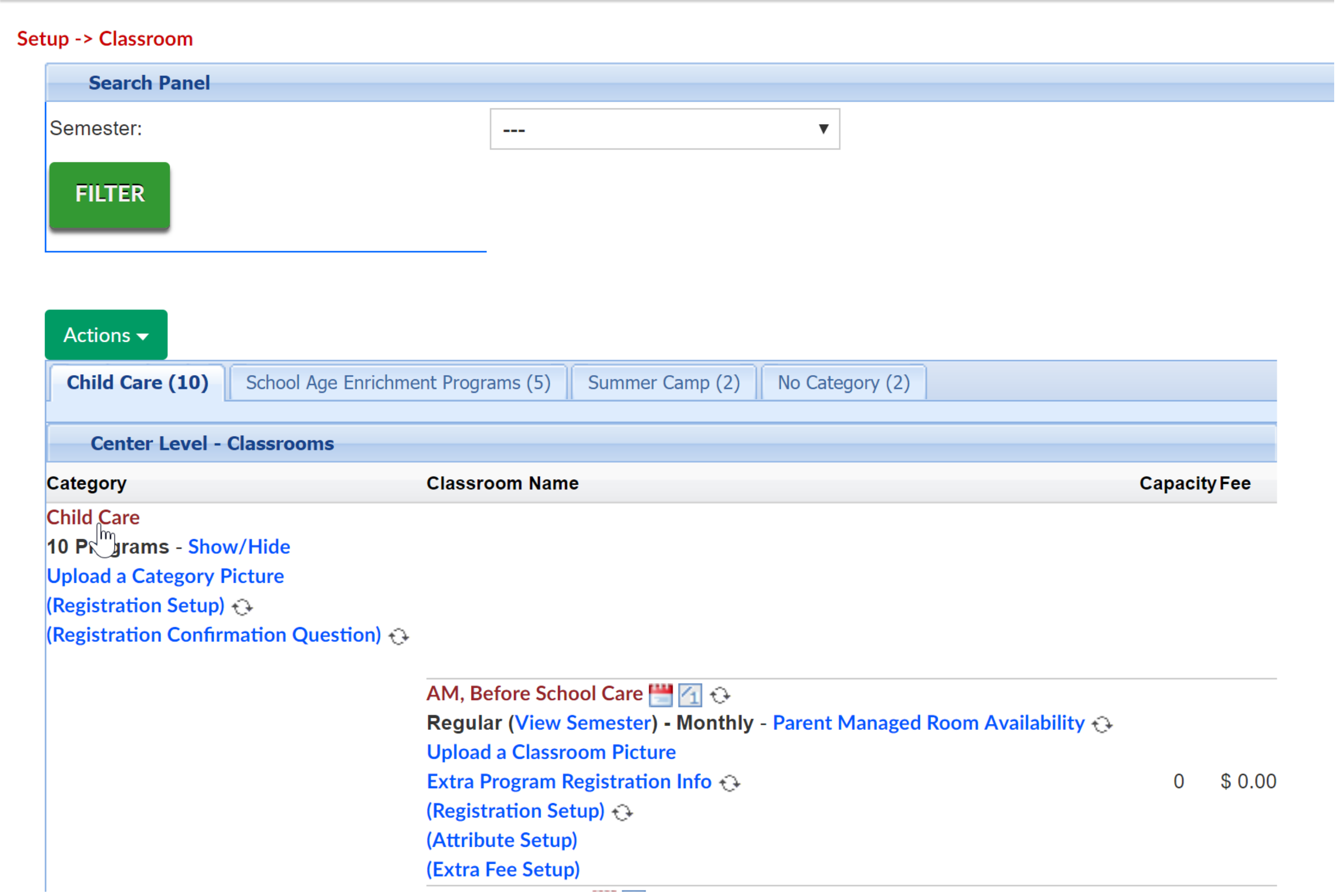
Last Modified on 06/28/2018 3:28 pm EDT

In order to add images to category descriptions, start page text or room descriptions the image must be hosted. That means that your image must already be uploaded in a public location.

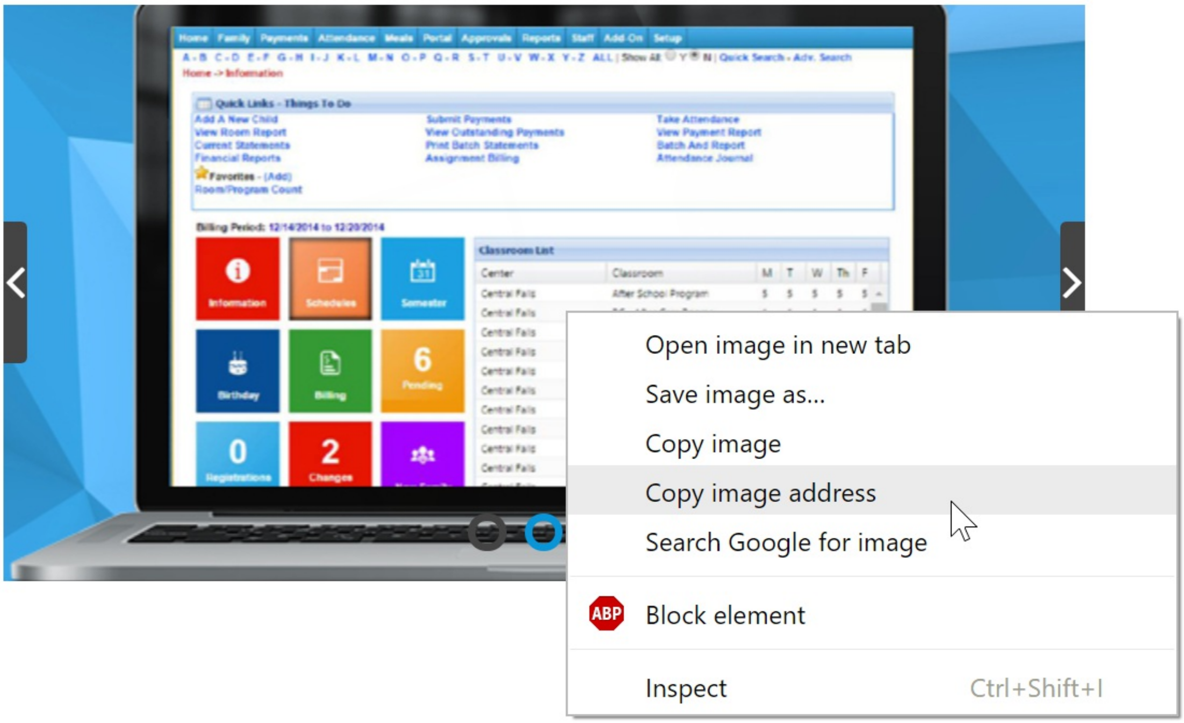
To add/update an image go to the setup > room screen.



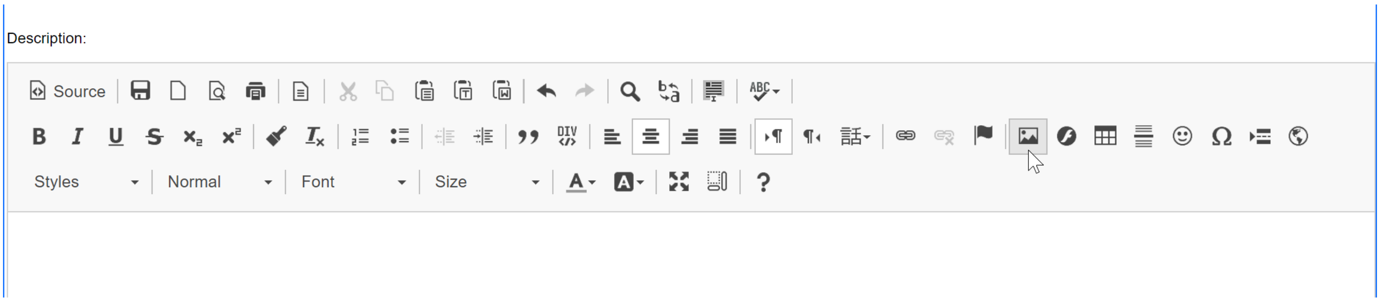
Select the Category or Room name and go to the text field where the image should be added.



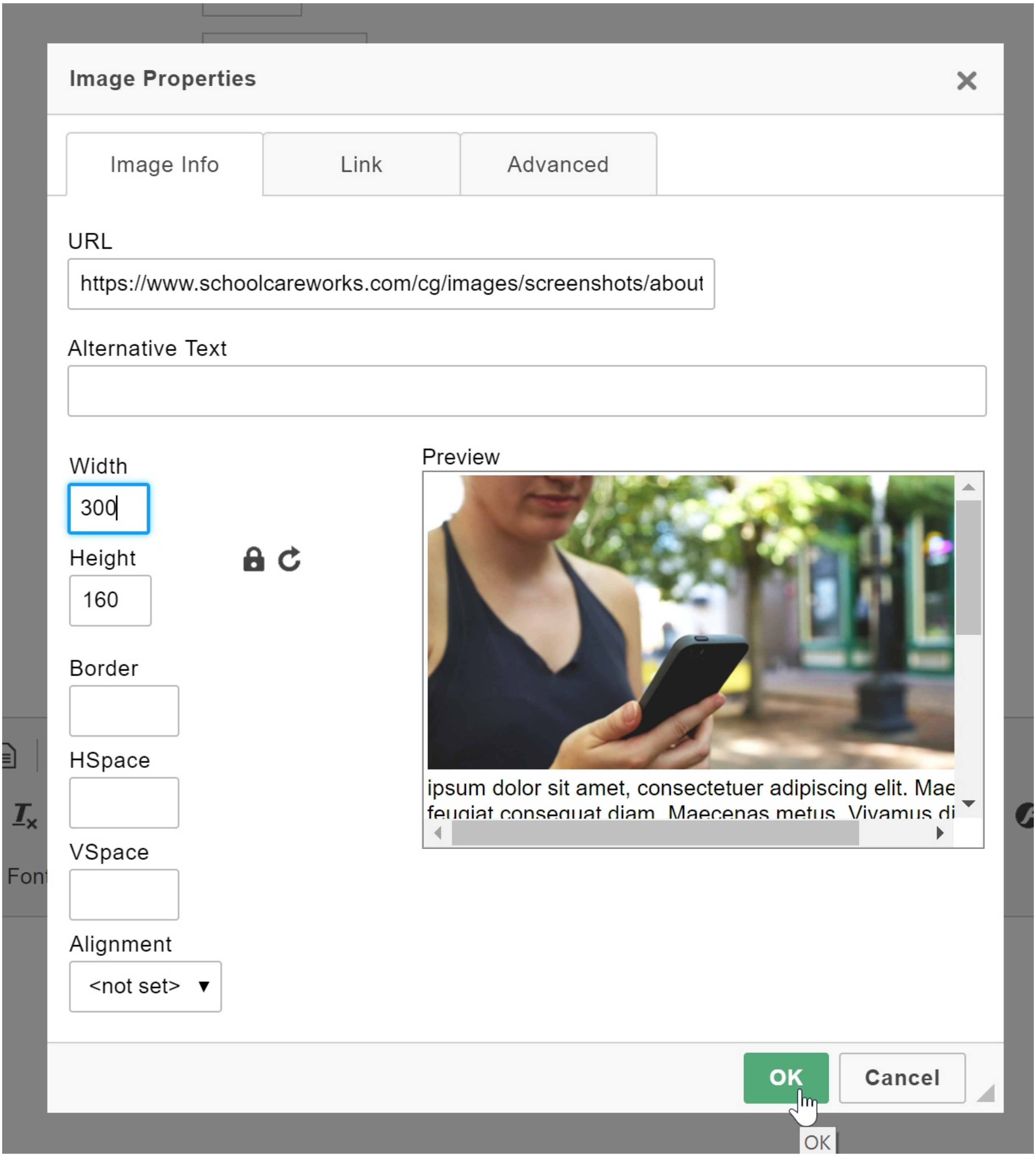
Find the URL for the image that you want to upload by right clicking on an image and selecting Copy Image Address-



Select the image icon -



Paste in the URL and adjust the size as needed, then press OK..



URL: https://www.schoolcareworks.com/cg/images/screenshots/about

Alternative Text:

Width: 300

Height: 160

Border:

HSpace:

VSpace:

Alignment: <not set>

ipsum dolor sit amet, consectetuer adipiscing elit. Mae
feugiat consequat diam. Maecenas metus. Vivamus di

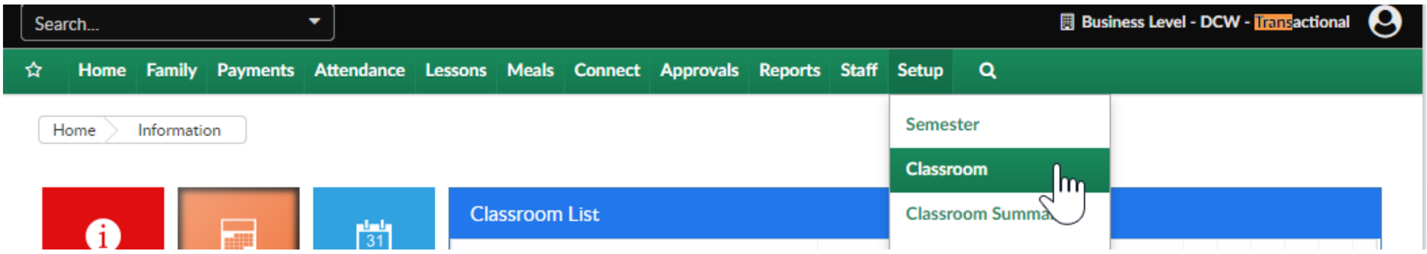
Once the room or category is saved the image will display in the correct location.

Room- How do I clone a room?

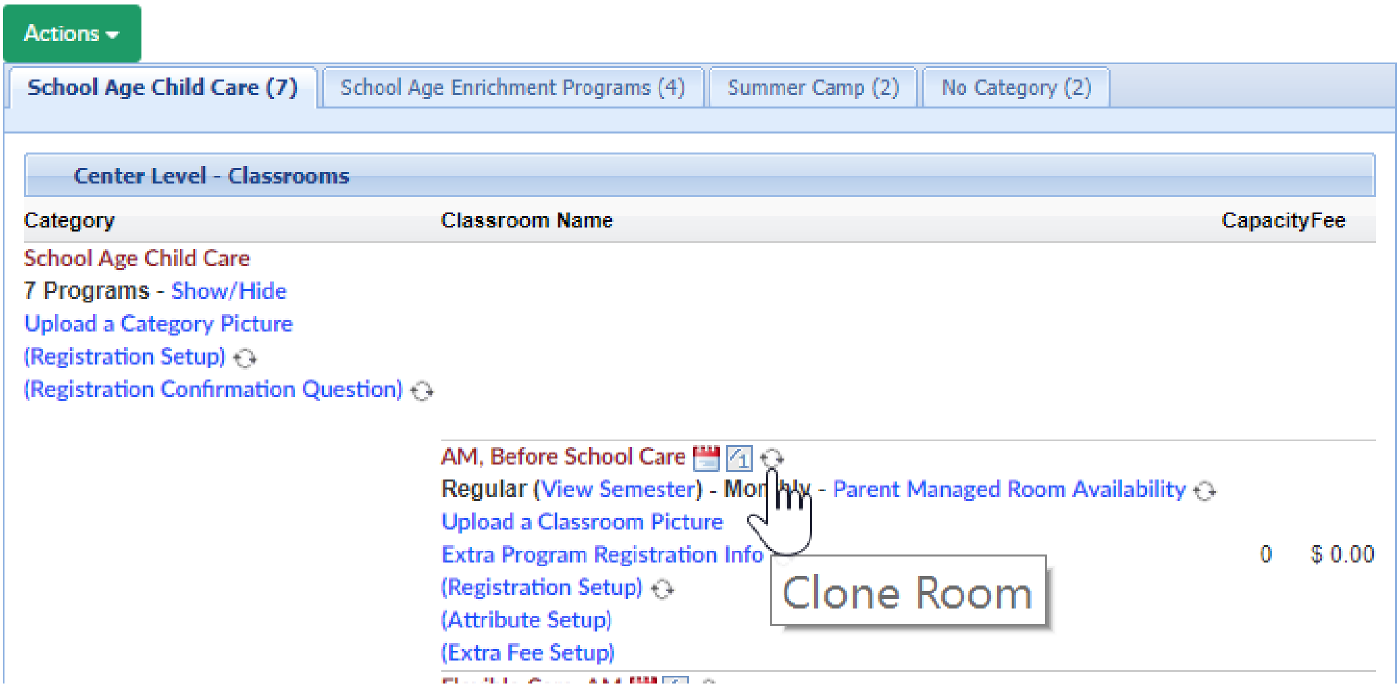
Last Modified on 06/28/2018 3:28 pm EDT

Cloning a room will allow a site to copy room and semester settings to a new room/program.

To clone a room go to setup > room



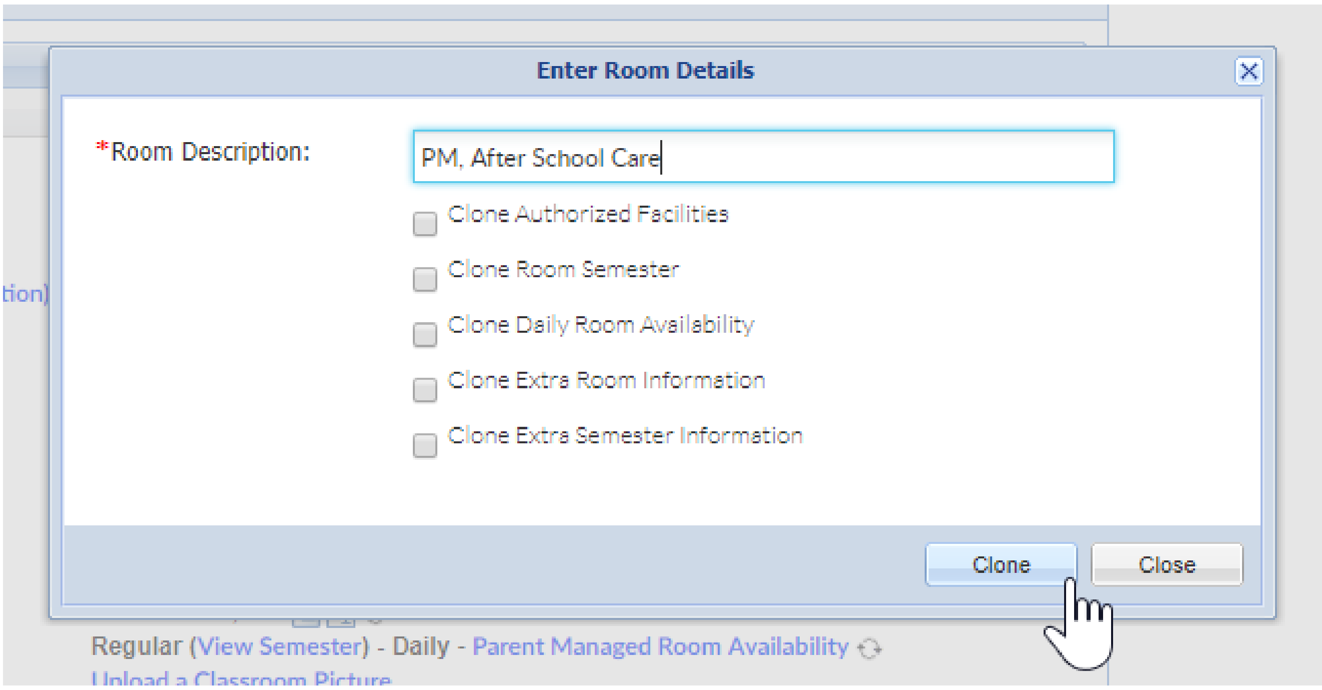
Then select the circle/arrow icon next to the room name



Enter the name of the new room and then select the additional detail that should be cloned

- Clone Authorized Facilities- select this option if the new room will be at the same sites/centers as the existing room
- Clone Room Semester- select this option if the new room should belong to the same semesters as the existing room

- Clone Daily Room Availability- select this option if the new room should have the same days setup as the existing room (parent managed calendars only)
- Clone Extra Room Information
- Clone Extra Semester Information



Enter Room Details

*Room Description: PM, After School Care

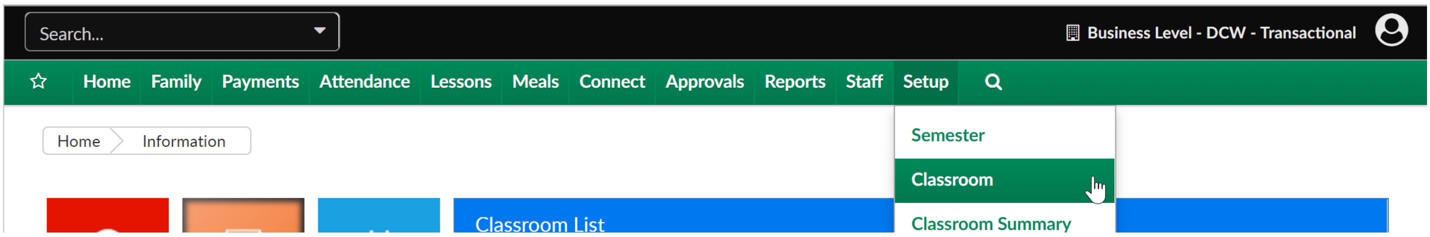
☐ Clone Authorized Facilities
☐ Clone Room Semester
☐ Clone Daily Room Availability
☐ Clone Extra Room Information
☐ Clone Extra Semester Information

In order to complete setup of the new room, make sure to check the room settings and the semester settings.

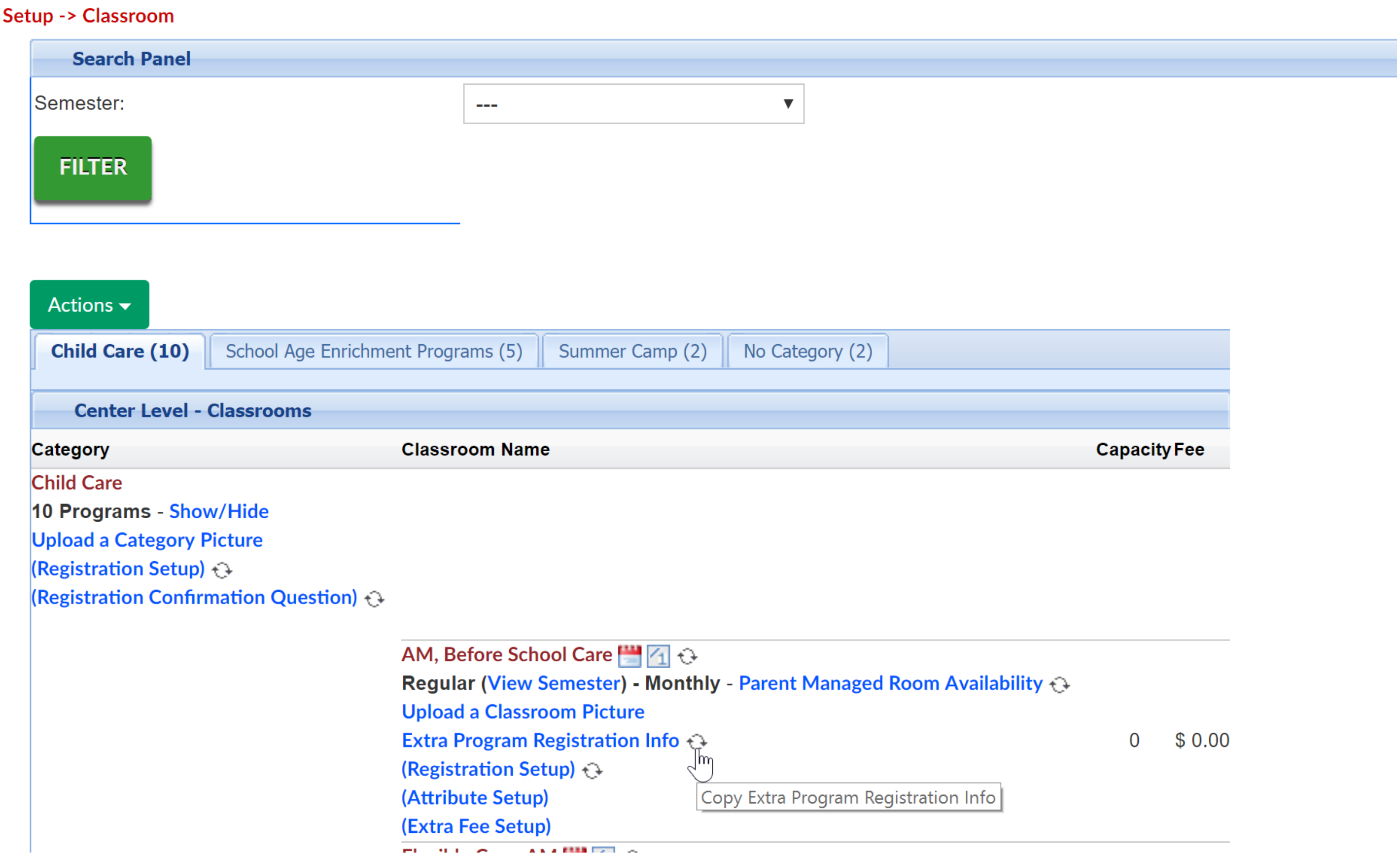
Room- How do I clone extra program registration info questions?

Last Modified on 04/13/2018 8:26 am EDT

Go to the Setup > Room page.

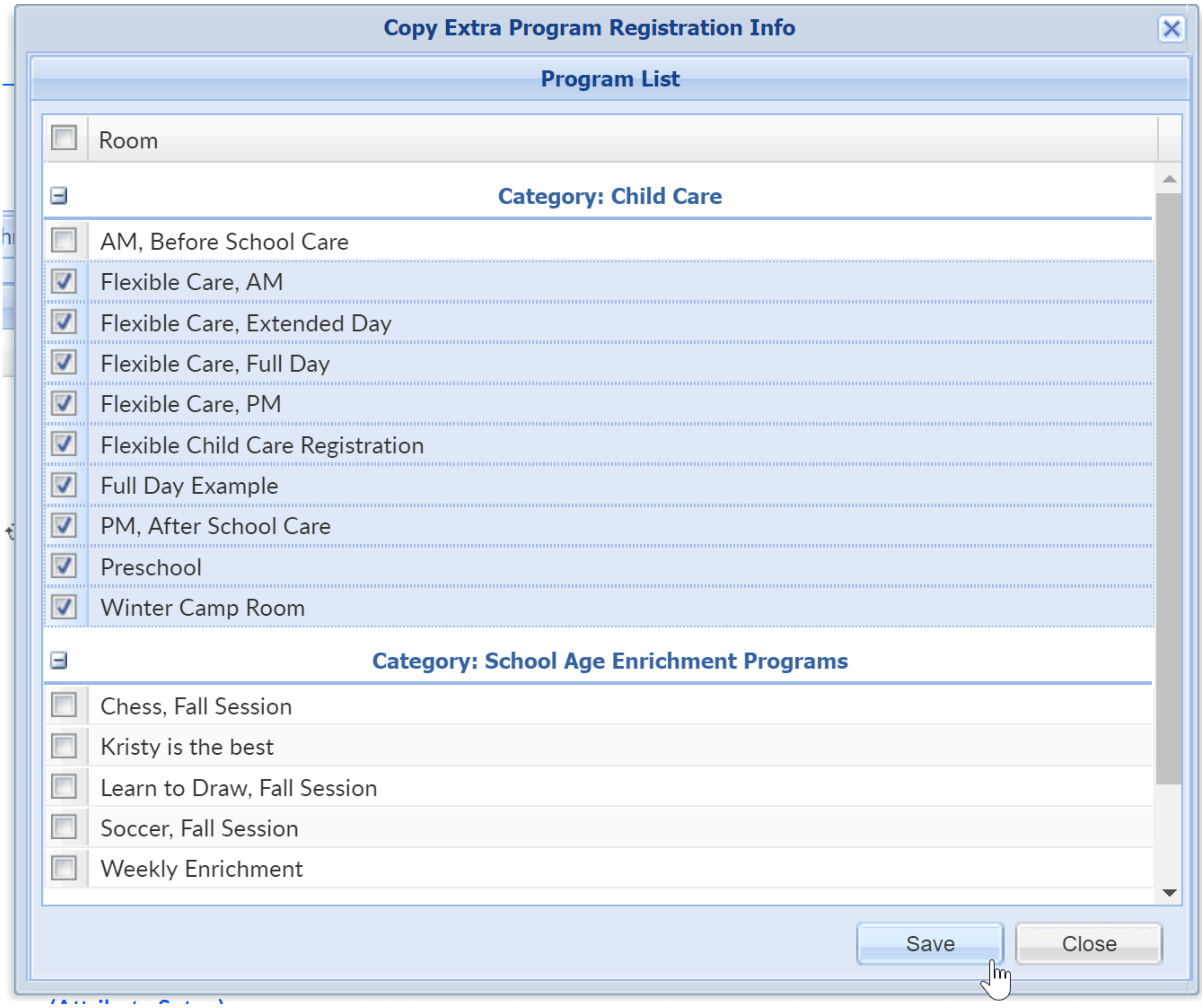


Under the room, select the clone icon next to the Extra Program Registration Info text.



Select the name of each program that the questions should be copied to, then press save.

Note: Do not select the room the questions are being copied FROM. Only select the programs the questions should be copied TO.



☐ Room

Category: Child Care

- ☐ AM, Before School Care
- ☑ Flexible Care, AM
- ☑ Flexible Care, Extended Day
- ☑ Flexible Care, Full Day
- ☑ Flexible Care, PM
- ☑ Flexible Child Care Registration
- ☑ Full Day Example
- ☑ PM, After School Care
- ☑ Preschool
- ☑ Winter Camp Room

Category: School Age Enrichment Programs

- ☐ Chess, Fall Session
- ☐ Kristy is the best
- ☐ Learn to Draw, Fall Session
- ☐ Soccer, Fall Session
- ☐ Weekly Enrichment

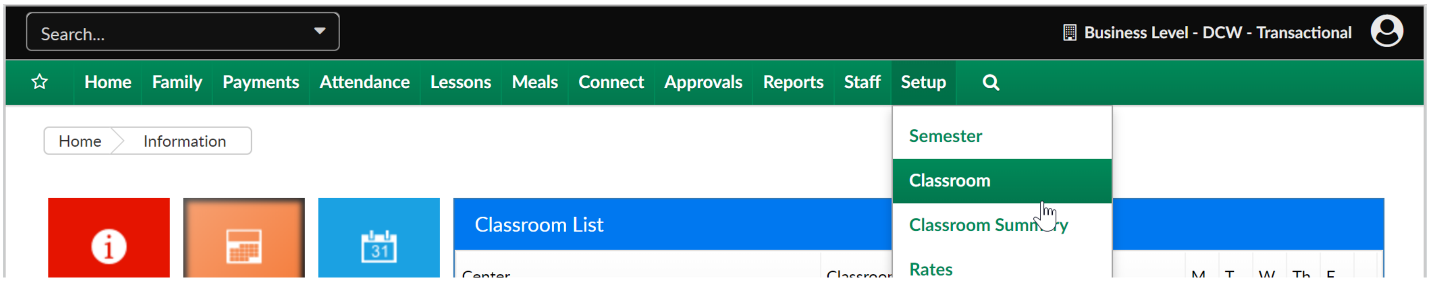
Only the Active questions will copy over.

Room- How do I add/change the student/teacher ratio?

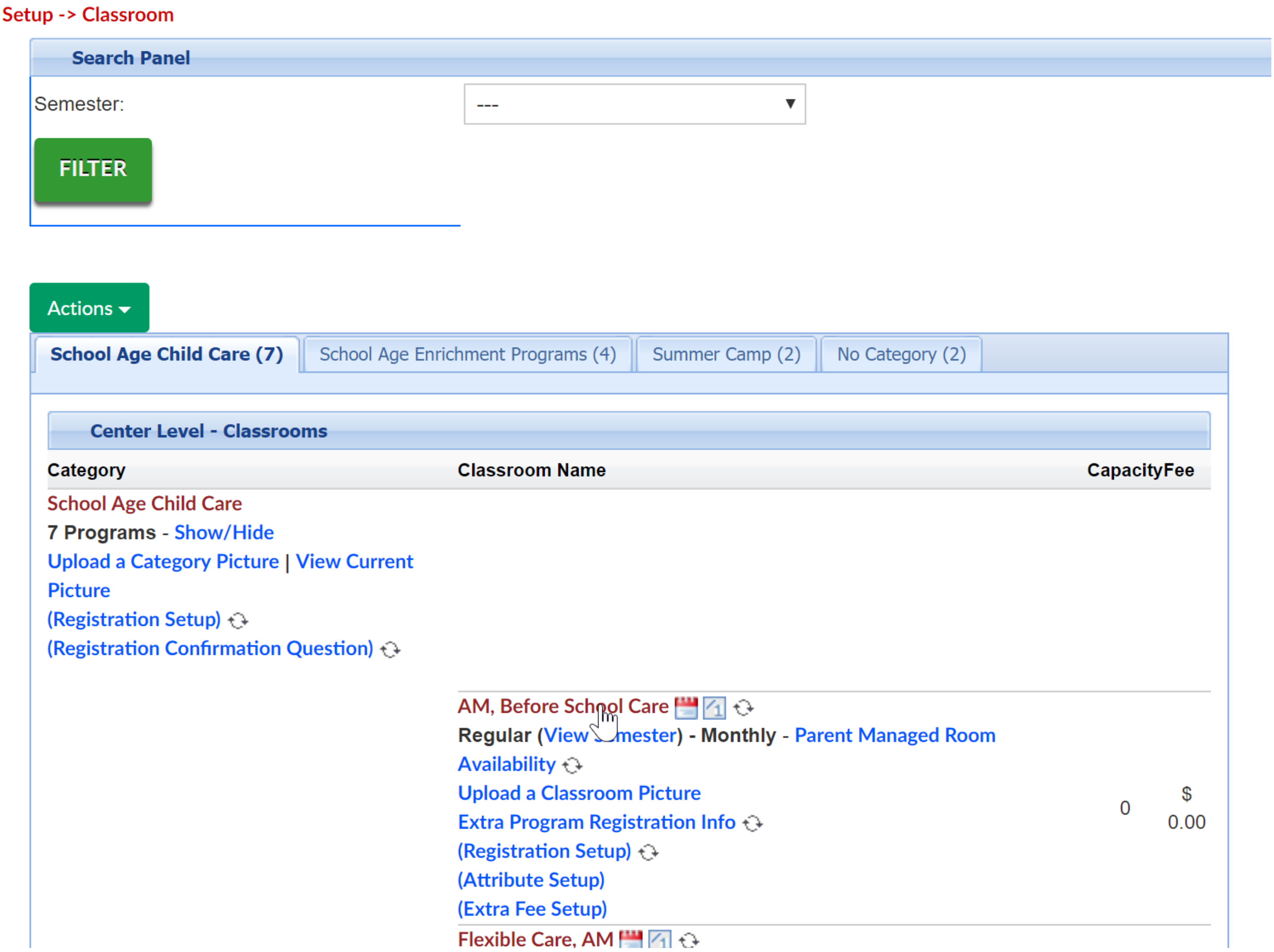
Last Modified on 02/26/2018 9:59 am EST

The student/teacher ratio will allow users to see if room/programs have the correct number of staff to the number of total children in a room/program. This will allow users to use the Live Ratio features in the system.

Go to Setup > Room



Click on the room name



Setup -> Classroom

Search Panel

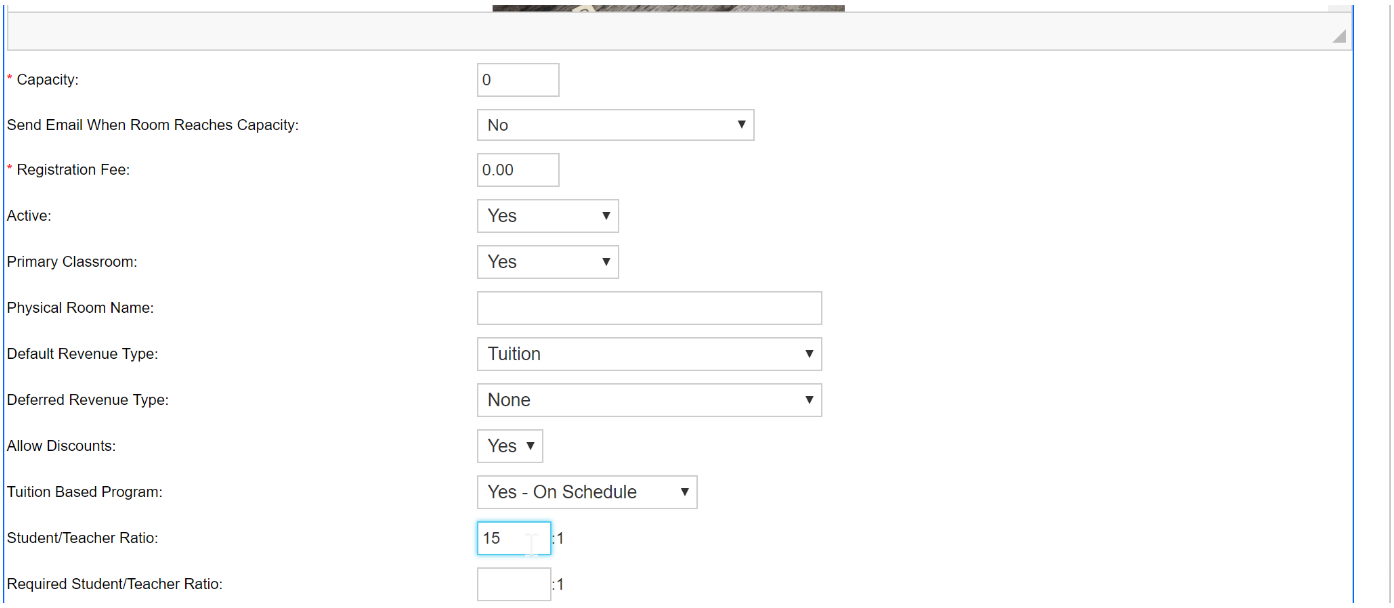
Semester: ---

School Age Child Care (7) | School Age Enrichment Programs (4) | Summer Camp (2) | No Category (2)

Center Level - Classrooms

Category	Classroom Name	Capacity	Fee
School Age Child Care **7 Programs** - Show/Hide Upload a Category Picture | View Current Picture (Registration Setup) (Registration Confirmation Question)			
	AM, Before School Care **Regular** (View Semester) - **Monthly** - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0	$ 0.00
	Flexible Care, AM		

Scroll to the Student/Teacher Ratio field and enter number of students to one teacher-



* Capacity:	0
Send Email When Room Reaches Capacity:	No
* Registration Fee:	0.00
Active:	Yes
Primary Classroom:	Yes
Physical Room Name:	
Default Revenue Type:	Tuition
Deferred Revenue Type:	None
Allow Discounts:	Yes
Tuition Based Program:	Yes - On Schedule
Student/Teacher Ratio:	15 :1
Required Student/Teacher Ratio:	:1

Scroll to the bottom of the room setup screen and save, press select all and then save.

Room- What type of room should I create?

Last Modified on 06/28/2018 3:32 pm EDT

In the system, rooms are the cornerstone for how parents can register into the system, how parents will be billed and how reporting can be pulled.

- If you want to build a room that will be billed weekly or monthly you will create a recurring billing room
    - If transactional you will need to set the billing cycle for each room/program under room/program setup
    - Be sure to add a default rate to the room if parents will be registering for the room/program
- If you want to charge a parent upfront for a program AND the program is a set fee you would want to create an event type room
    - With events, parents will not be able to select days of care.
    - Event type rooms work well for holiday/in service camp days, weekly break options
- If you want parents to select days off of a calendar and pay a daily rate up front you would create a parent managed registration room and one or more parent managed calendar rooms
    - Parent managed rooms are a two step process for parents
        - 1. Parents register for a parent managed registration room
        - 2. Once families have been accepted into the registration room they go to the attendance tab on the parent portal and select specific days of care
            - Rates should be added to calendar rooms, the rate should be a daily rate

---

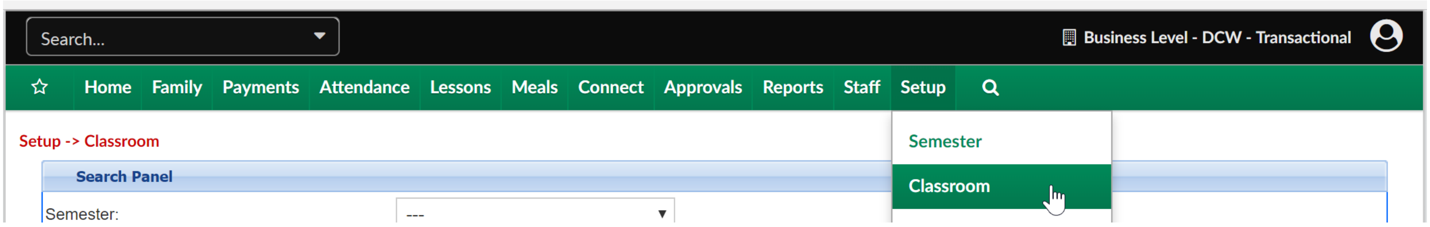
Room- How do I allow for parents to request a room/program change?

Last Modified on 05/11/2018 3:07 pm EDT

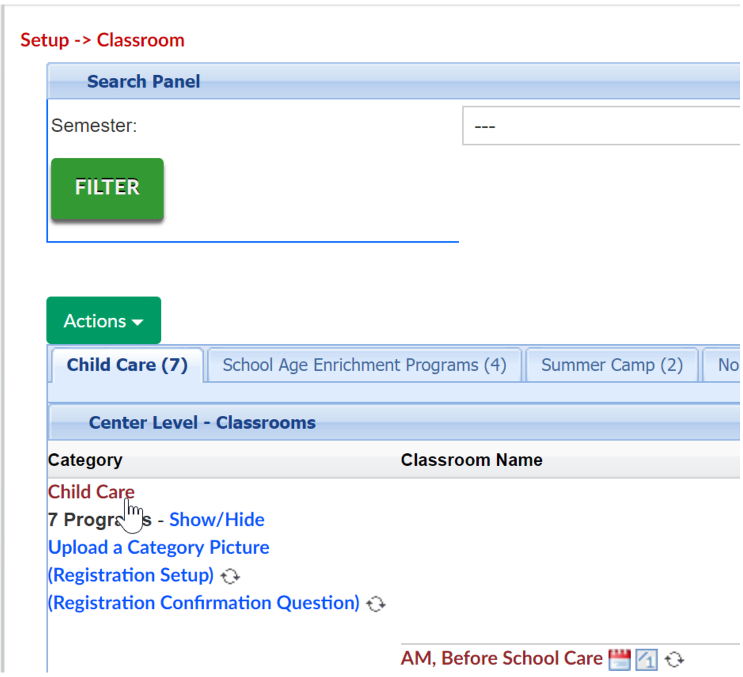
Parents are able to request schedule changes from the parent portal if a site has elected to allow it.

Important things to note- this should only be done if using daily or weekly rates, otherwise the rate would need to be manually adjusted on a family's financial ledger if billing up front.

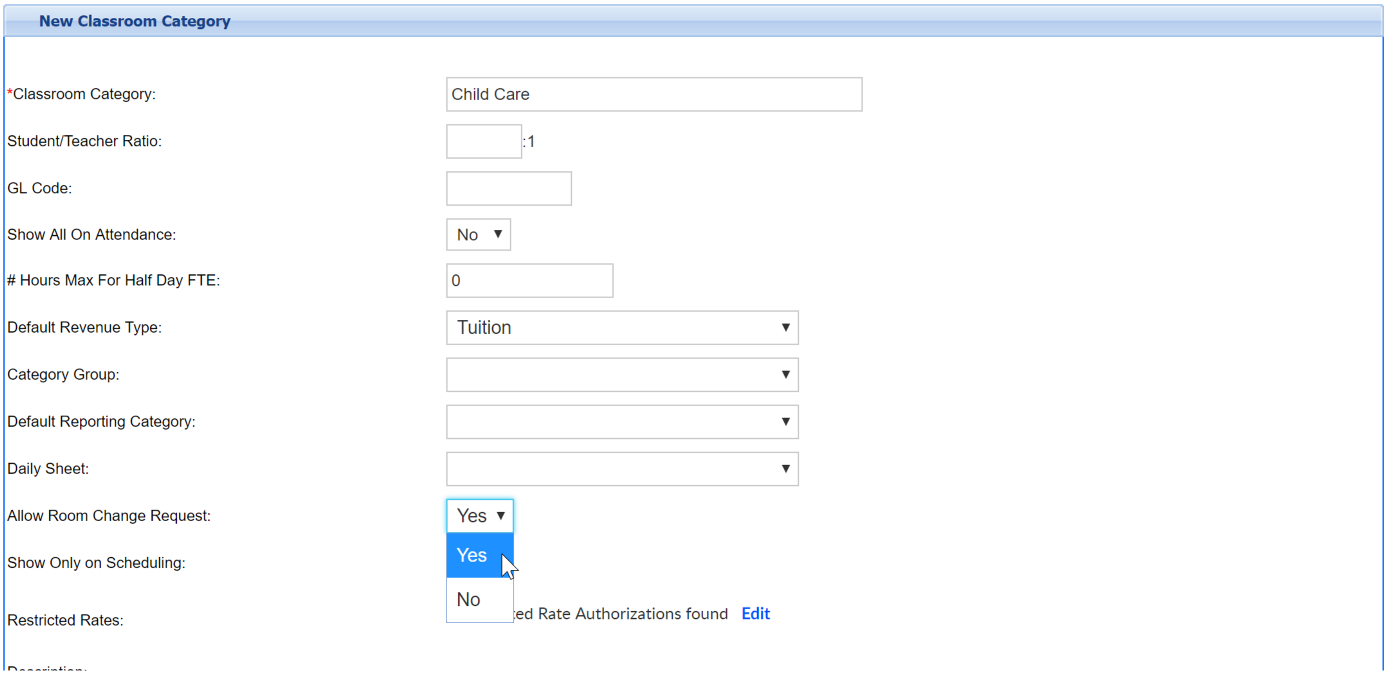
To enable schedule change requests go to the Setup menu and select the Room/Classroom/Program option-



Select a category name-



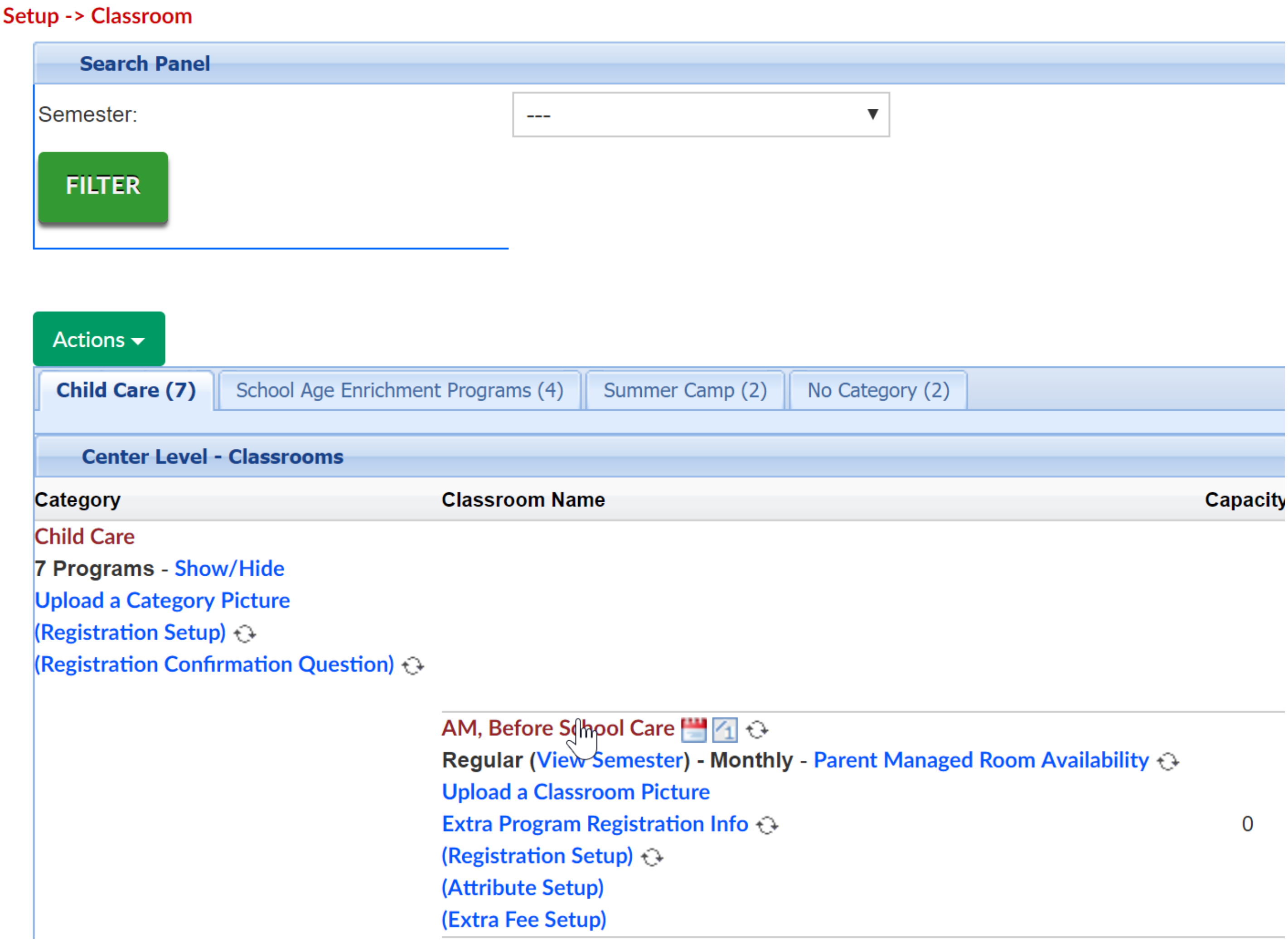
Make sure Allow Room Change Request is set to Yes, scroll to the bottom of the page and press Save.



New Classroom Category

*Classroom Category:	Child Care
Student/Teacher Ratio:	:1
GL Code:	
Show All On Attendance:	No
# Hours Max For Half Day FTE:	0
Default Revenue Type:	Tuition
Category Group:	
Default Reporting Category:	
Daily Sheet:	
Allow Room Change Request:	Yes
Show Only on Scheduling:	
Restricted Rates:	ed Rate Authorizations found Edit

On each room that room change requests should be allowed, click on the room name.



Setup -> Classroom

Search Panel

Semester: ---

Center Level - Classrooms

Category	Classroom Name	Capacity
Child Care 7 Programs - Show/Hide Upload a Category Picture (Registration Setup) (Registration Confirmation Question)		
	AM, Before School Care Regular (View Semester) - Monthly - Parent Managed Room Availability Upload a Classroom Picture Extra Program Registration Info (Registration Setup) (Attribute Setup) (Extra Fee Setup)	0

Scroll to the request fields, only one of these options should be selected.

- Allow Room Change Request
    - Yes= parents are able to request day changes for their program
    - No= parents are not able to request day changes
- Allow Schedule Cancel Request
    - Yes= parents can request to cancel their program/room assignment
    - No= parents will have to contact a site admin to have program canceled/removed from child's record

In either case, once approved, manual credits or debits may need to be completed to true up the family's financial ledger if the schedule change happened mid-billing cycle.

Allow Room Change Request: Yes ▼

Allow Schedule Cancel Request: No ▼

Scroll to the bottom of the page and press save.

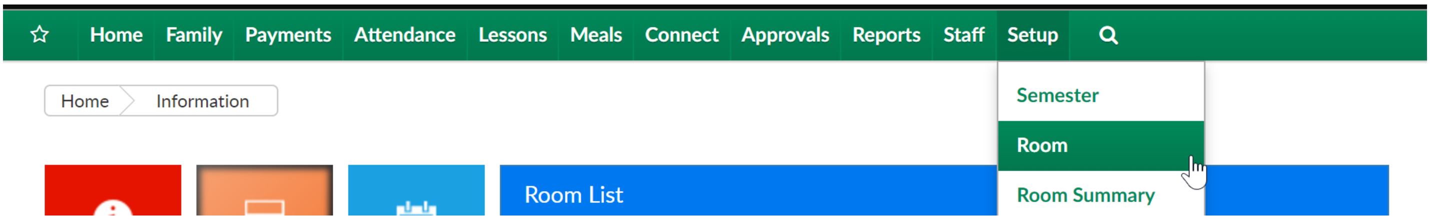
Click here to see how parents request the change in the parent portal.

Room- How do I add time options for parents to drop off/pick up?

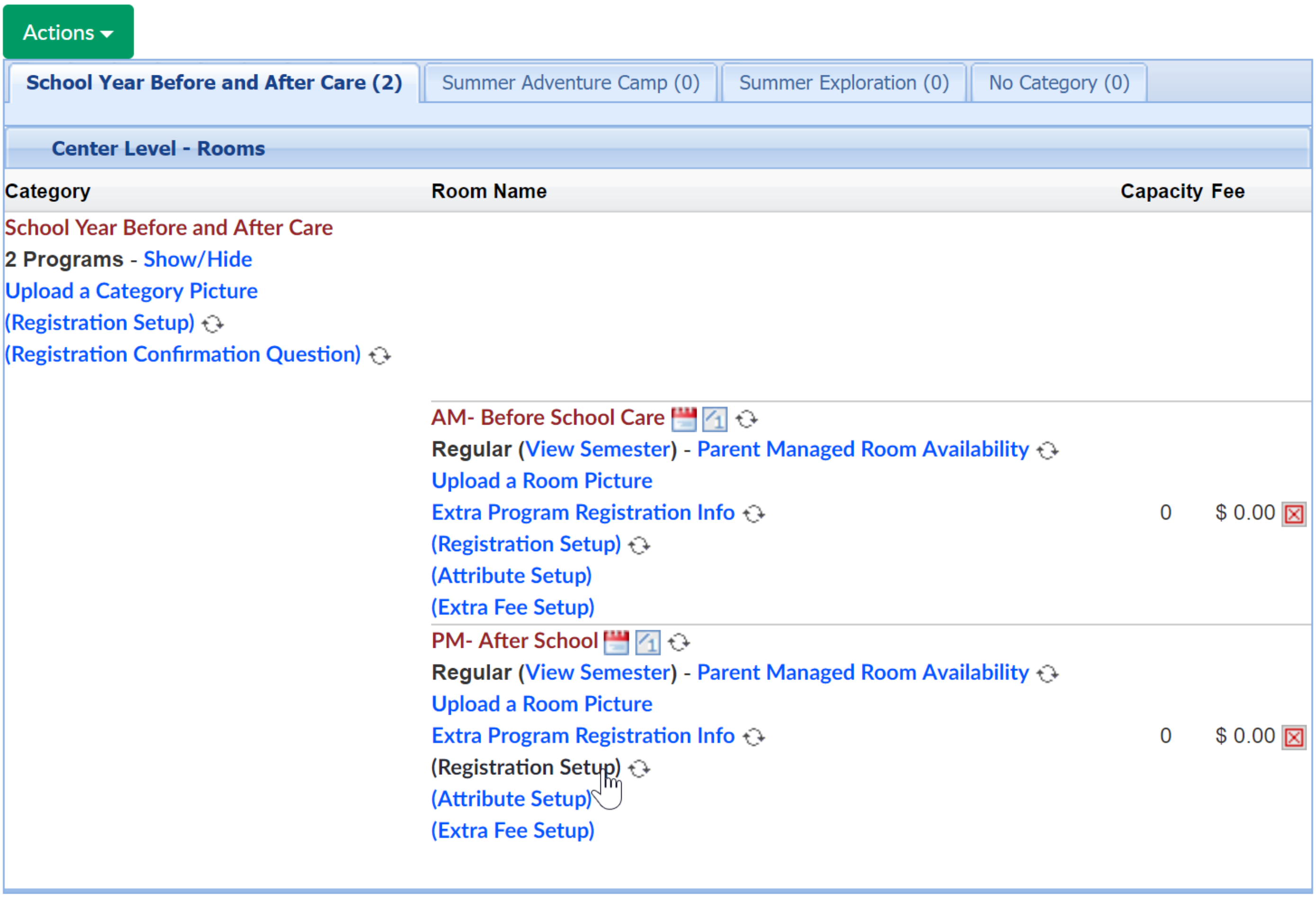
Last Modified on 06/28/2018 3:33 pm EDT

To add times that parents can drop off/pick up their children go to the setup menu and select the room/classroom option.

Note: Arrival/Departure time are set at the room level.

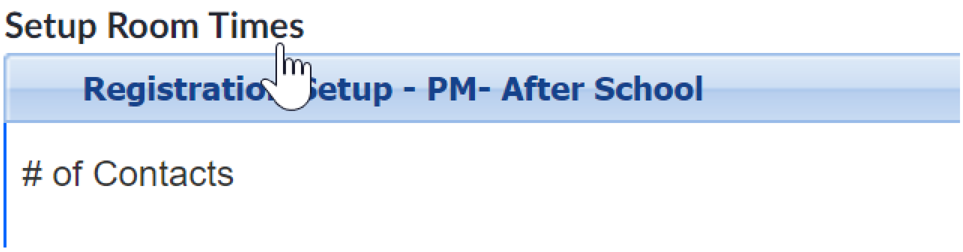


Then select the registration setup option under the room's name-



Select the Setup Room Times link-

Setup -> *PM- After School* -> Registration Setup



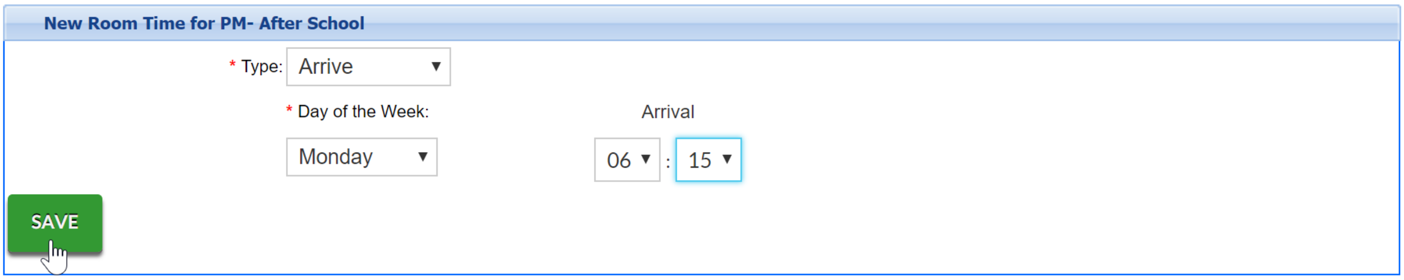
Choose the type of time you will be entering-

- Arrival- time the parent will be dropping off
- Departure- time the parent will be picking up
- Arrival/Departure- drop off AND pickup time

Choose the day of the week

Choose the time(s)

Then press Save


New Room Time for PM- After School

* Type: Arrive

* Day of the Week: Monday

Arrival 06 : 15

Continue this process until all time options have been added for each day.

There is not currently a way to copy this from room to room, so this must be done at each room level, for each day and time manually.

Room- How do I remove room/program/classrooms from displaying?

Last Modified on 06/28/2018 3:35 pm EDT

Once a room/program has been added to the system and associated with a semester the room can no longer be deleted.

If you do not want the room/program displaying in drop down lists any longer on the admin side you can change the room's active status to no. Go to the setup > room page, then select the room name. Scroll to the Active field and select No.

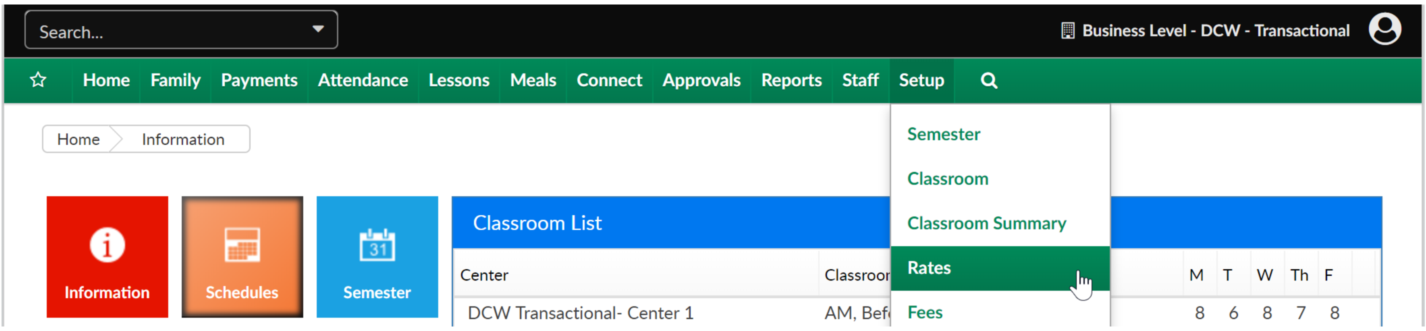
If you do not want the room/program displaying on a registration page any longer you can go to the semester summary screen and edit the specific room/semester pairings. Click here to go see how to navigate to the semester summary screen!

You can also go to the setup > room page, click on the room name of the room/program you no longer want to display, rename the room (i.e. do not use), change category to select a category, change active to no, scroll to the bottom and remove all center/room associations. If you do this the room will not display on the registration page and will not display in drop-down boxes throughout the admin side of the site.

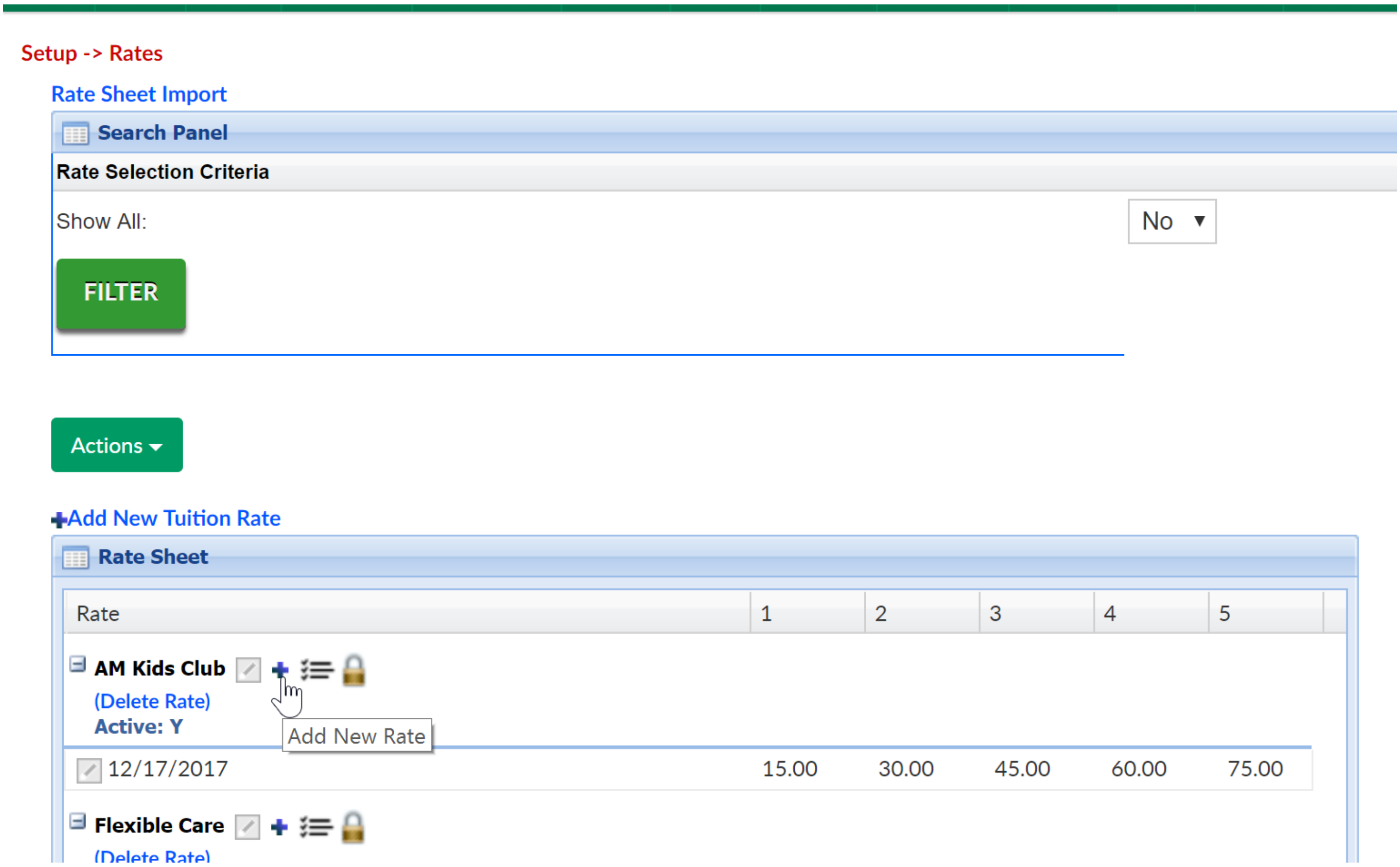
Rates- How do I enter a rate increase?

Last Modified on 03/16/2018 12:38 pm EDT

From the Setup menu, select the Rates option-



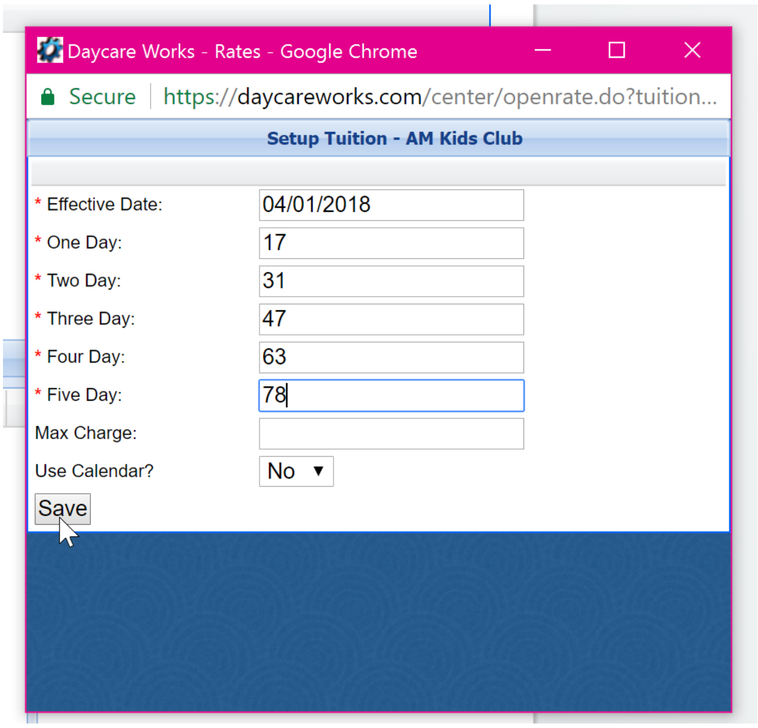
Select the plus button next to the rate's name-



Rate	1	2	3	4	5
AM Kids Club (Delete Rate) Active: Y					
12/17/2017	15.00	30.00	45.00	60.00	75.00
Flexible Care (Delete Rate)					

Enter the date you want the rate increase to take effect, then the cost for days 1-5- press Save to commit the change.

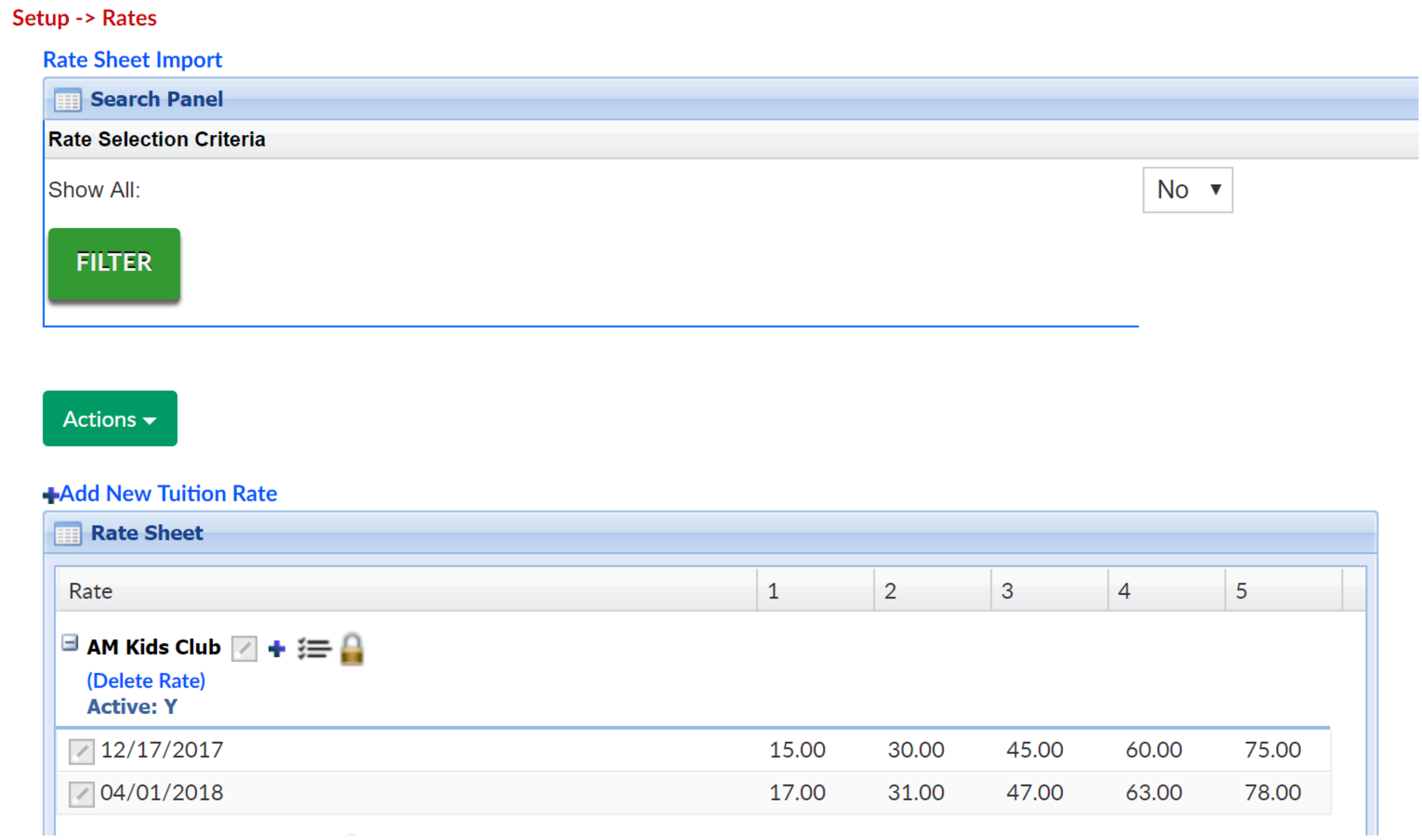
As of the effective date anyone with the rate will be charged the increased value.



Setup Tuition - AM Kids Club

* Effective Date:	04/01/2018
* One Day:	17
* Two Day:	31
* Three Day:	47
* Four Day:	63
* Five Day:	78
Max Charge:	
Use Calendar?	No ▾

On the rate screen the rate change will show below the original rate for records purposes.



Rate Selection Criteria

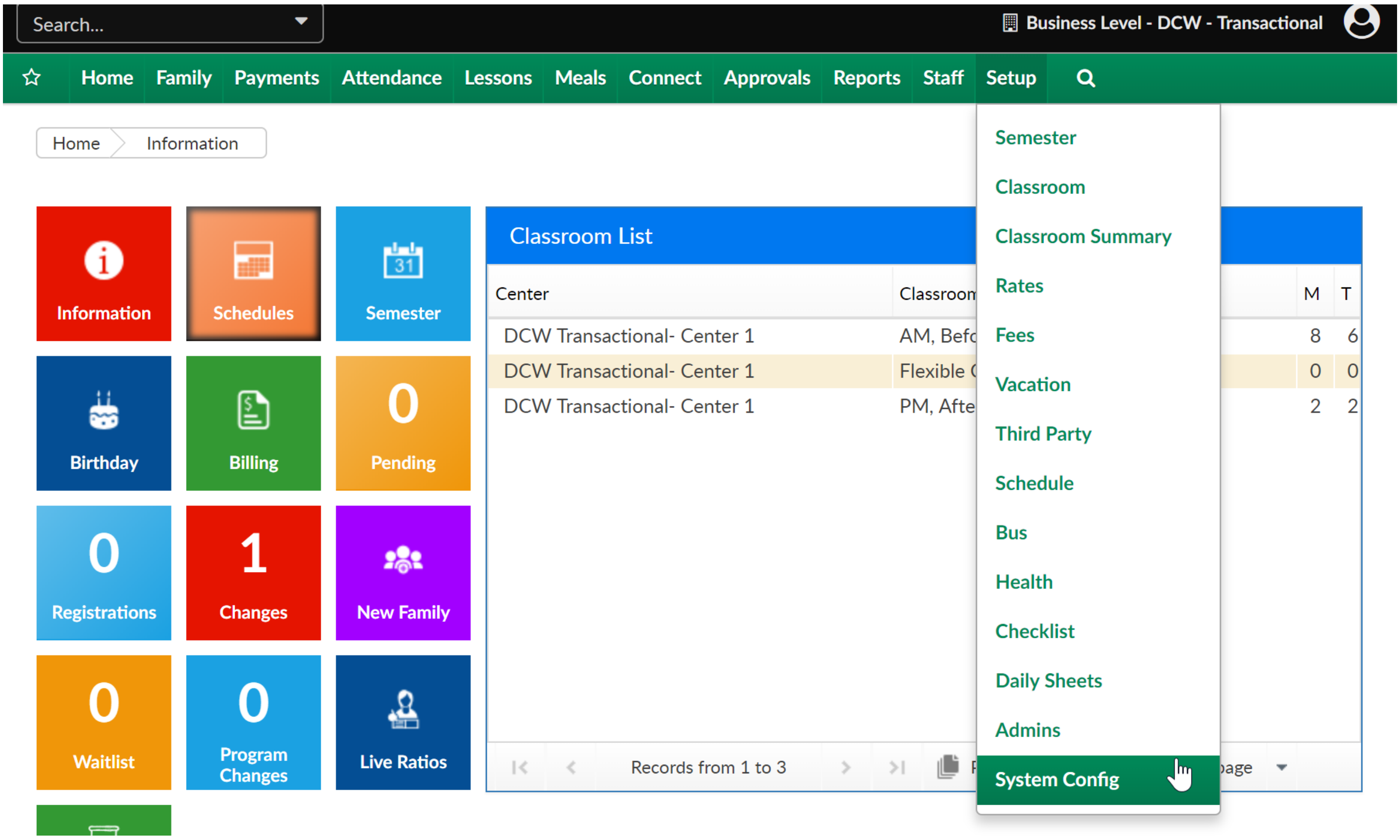
Show All: No ▾

Rate	1	2	3	4	5
AM Kids Club (Delete Rate) **Active: Y**					
12/17/2017	15.00	30.00	45.00	60.00	75.00
04/01/2018	17.00	31.00	47.00	63.00	78.00

Setup- Add or Update Tax ID

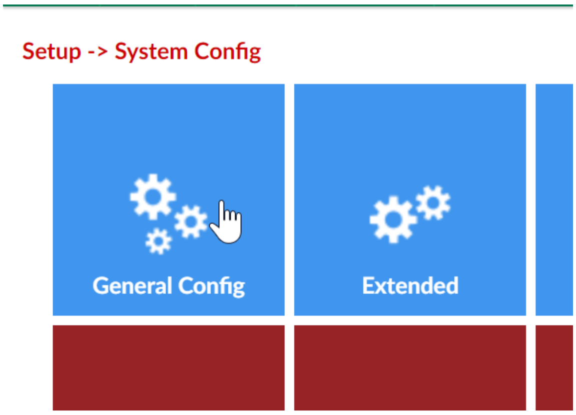
Last Modified on 03/16/2018 12:41 pm EDT

To add or update your site's tax ID go to Setup > System Config

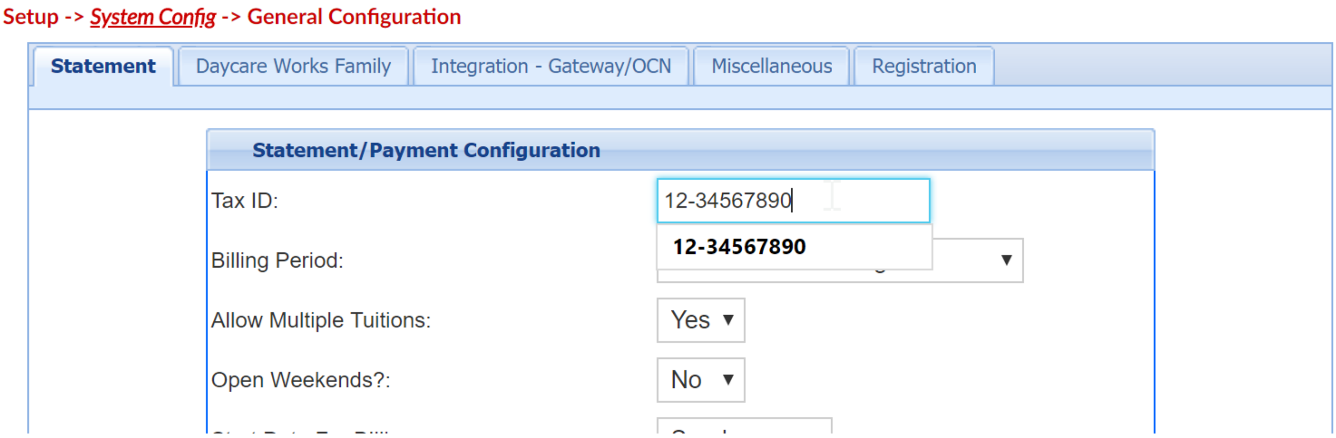


Center	Classroom	M	T
DCW Transactional- Center 1	AM, Befo	8	6
DCW Transactional- Center 1	Flexible (	0	0
DCW Transactional- Center 1	PM, Afte	2	2

Then select the General Config option.



The first field on the screen is Tax ID, update the number-



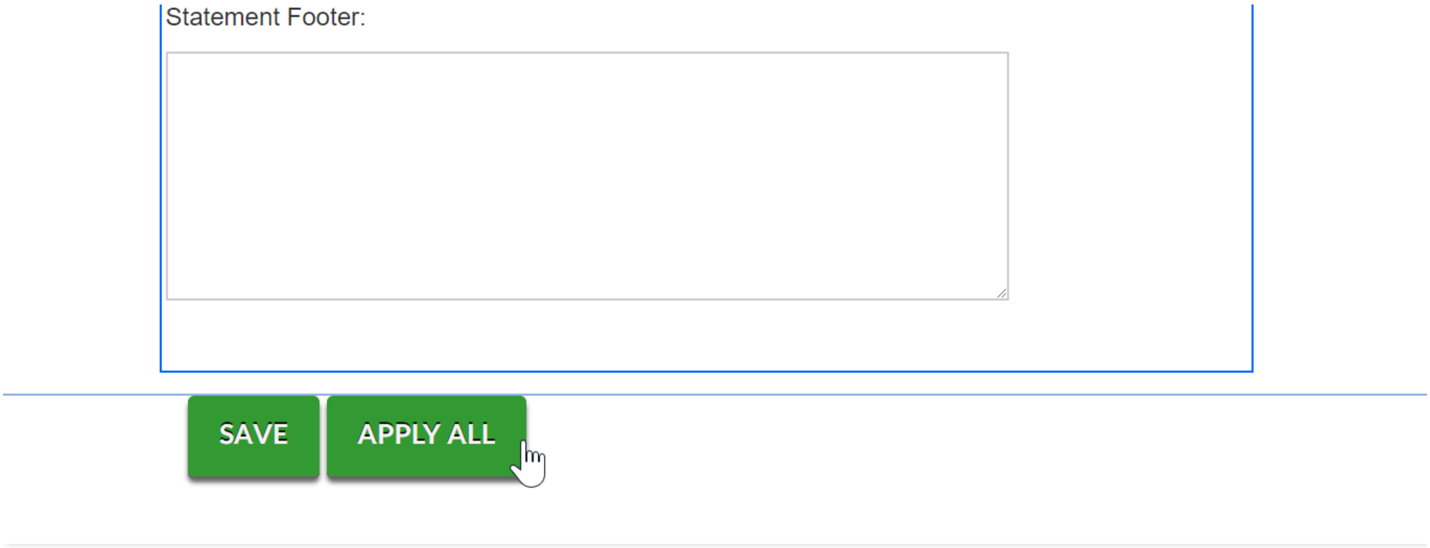
Tax ID: 12-34567890

Billing Period:

Allow Multiple Tuitions: Yes

Open Weekends?: No

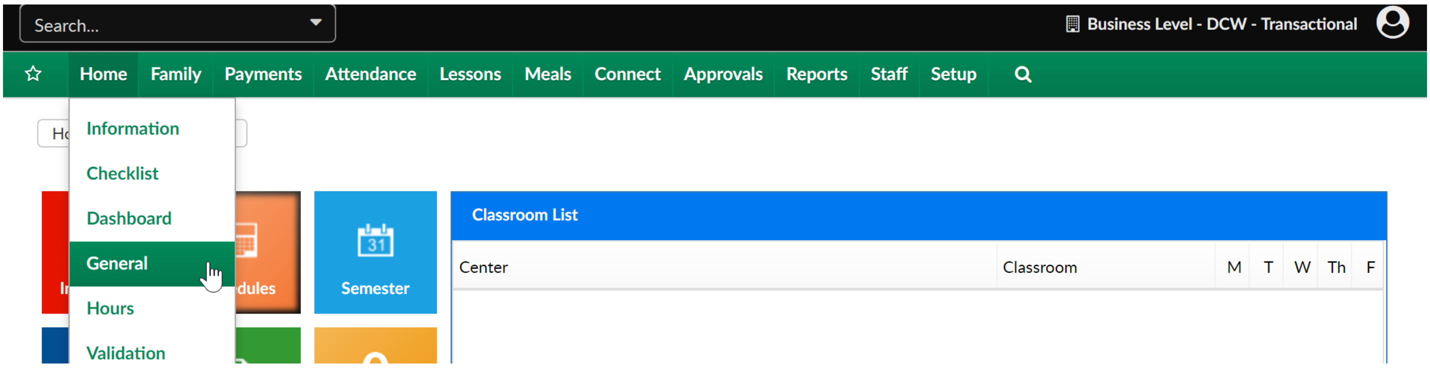
Then scroll to the bottom of the page and apply to all.



Setup- How do I edit the name of a center or site?

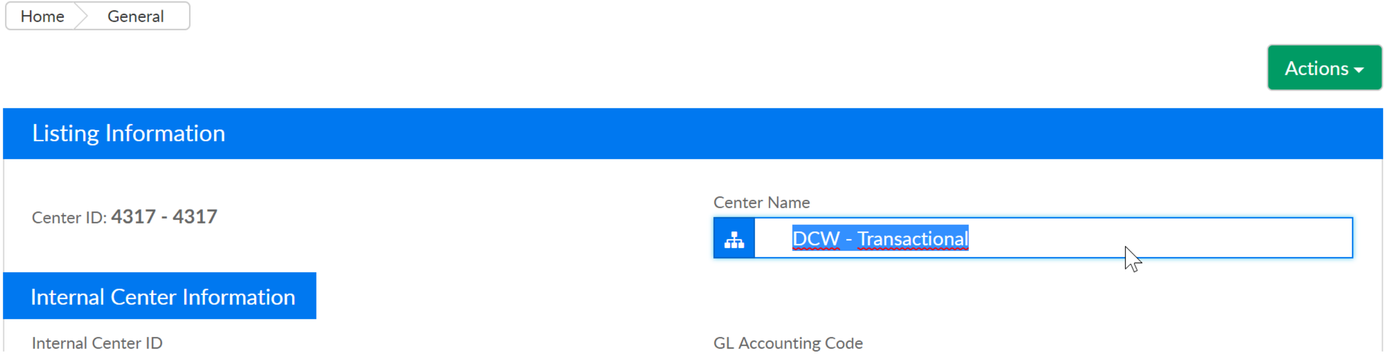
Last Modified on 05/25/2018 11:54 am EDT

Go to Home menu, then select the General option.



Update the name of the site or business level and type the updated name in the Center Name field. The center name will display on reports and family statements.

Be sure to press Save to commit change. Logout and log back in to see the update!



Center ID: 4317 - 4317

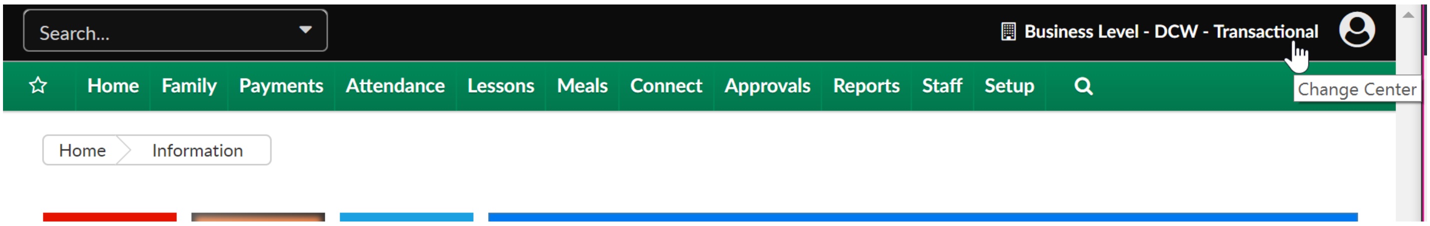
Center Name: DCW - Transactional

Setup- How do I add or edit the hours a center is open?

Last Modified on 03/16/2018 12:44 pm EDT

Hours should be added at the center level rather than the business level.

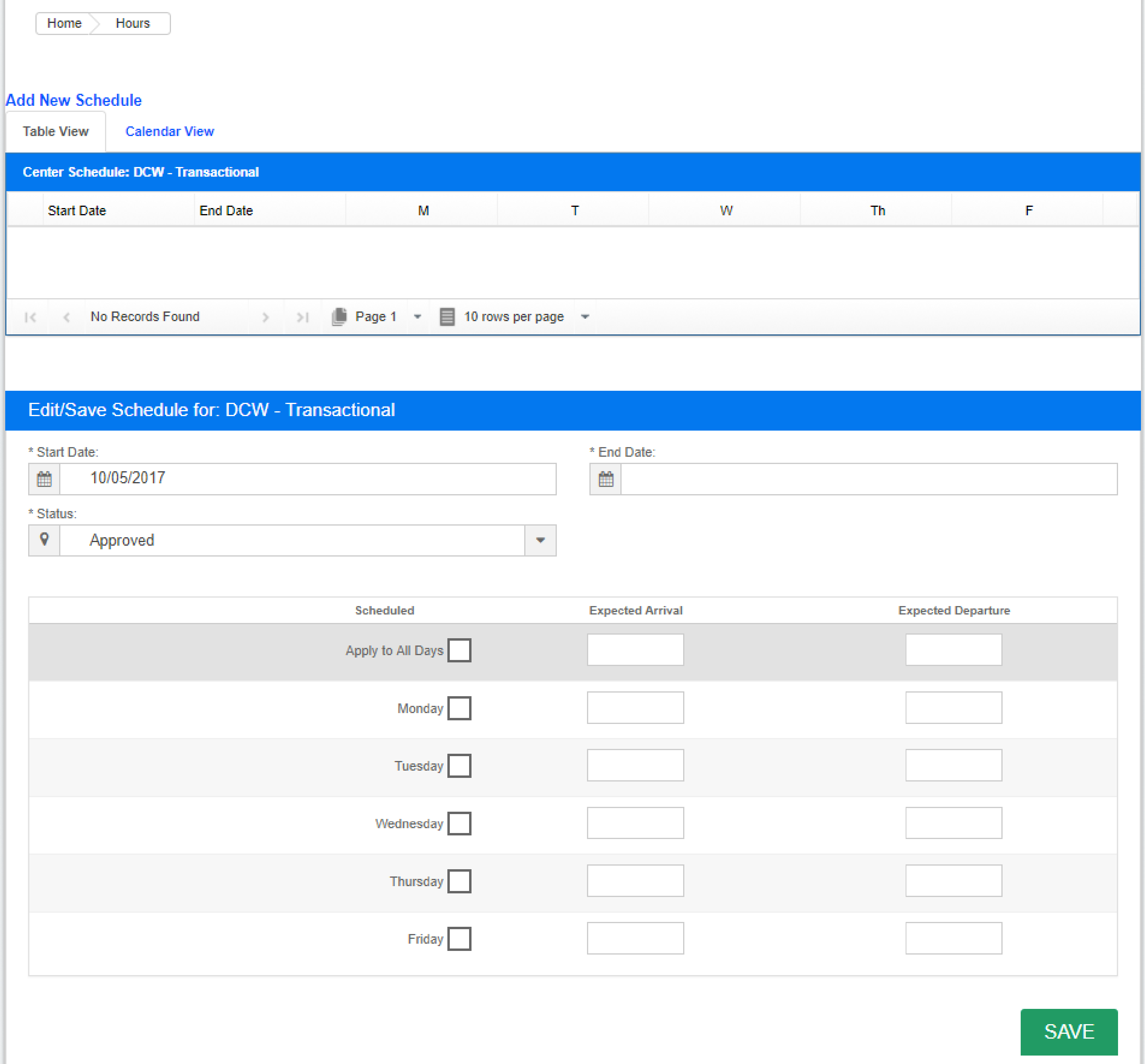
If you are at the business level, go to the top right side of the screen.



Then select the first site to update.

Once the site/center loads, go to the Home > Hour s tab.

To add new hours go to the Edit/Save Schedule section-



Center Schedule: DCW - Transactional

Start Date	End Date	M	T	W	Th	F

Edit/Save Schedule for: DCW - Transactional

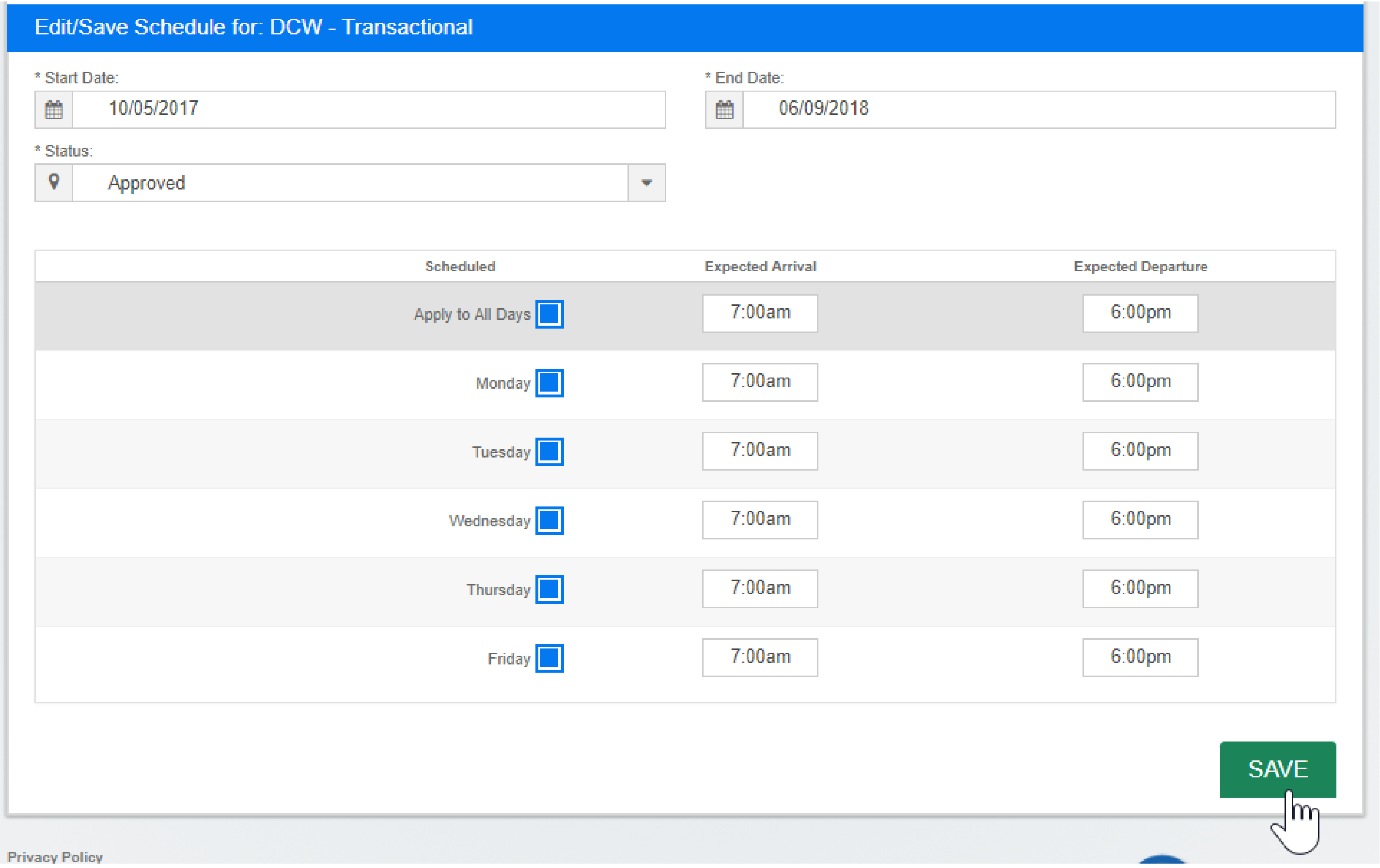
* Start Date: 10/05/2017

* End Date:

* Status: Approved

Scheduled	Expected Arrival	Expected Departure
Apply to All Days ☐		
Monday ☐		
Tuesday ☐		
Wednesday ☐		
Thursday ☐		
Friday ☐		

Enter the start date, end date, status and scheduled days and times, then press Save.



Edit/Save Schedule for: DCW - Transactional

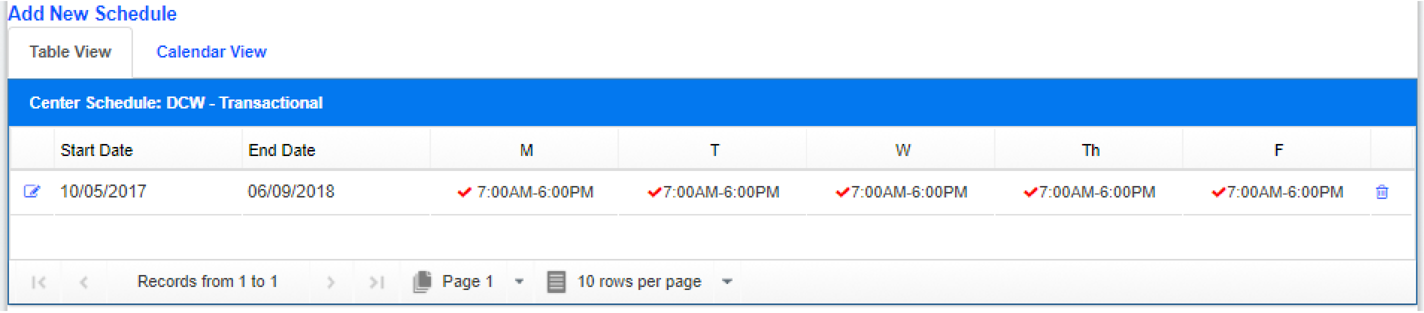
* Start Date: 10/05/2017

* End Date: 06/09/2018

* Status: Approved

Scheduled	Expected Arrival	Expected Departure
Apply to All Days ☑	7:00am	6:00pm
Monday ☑	7:00am	6:00pm
Tuesday ☑	7:00am	6:00pm
Wednesday ☑	7:00am	6:00pm
Thursday ☑	7:00am	6:00pm
Friday ☑	7:00am	6:00pm

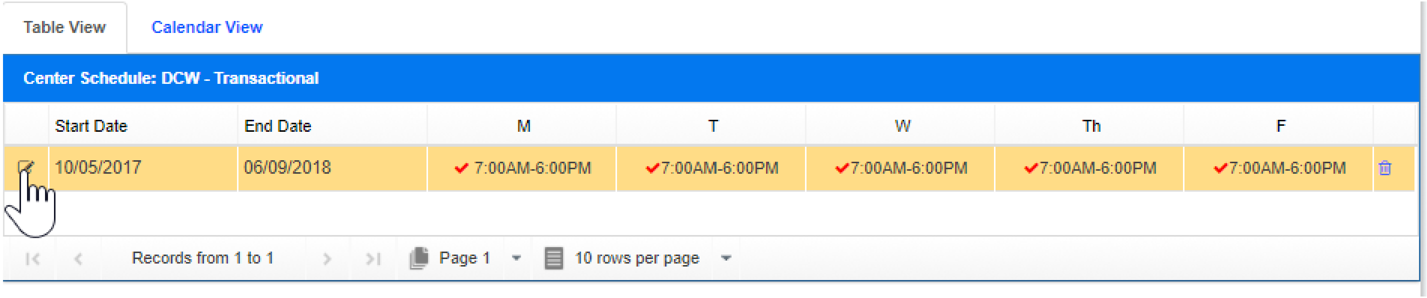
The schedule will save and display in the Center Schedule box-



Center Schedule: DCW - Transactional

	Start Date	End Date	M	T	W	Th	F	
	10/05/2017	06/09/2018	✓ 7:00AM-6:00PM	✓7:00AM-6:00PM	✓7:00AM-6:00PM	✓7:00AM-6:00PM	✓7:00AM-6:00PM	

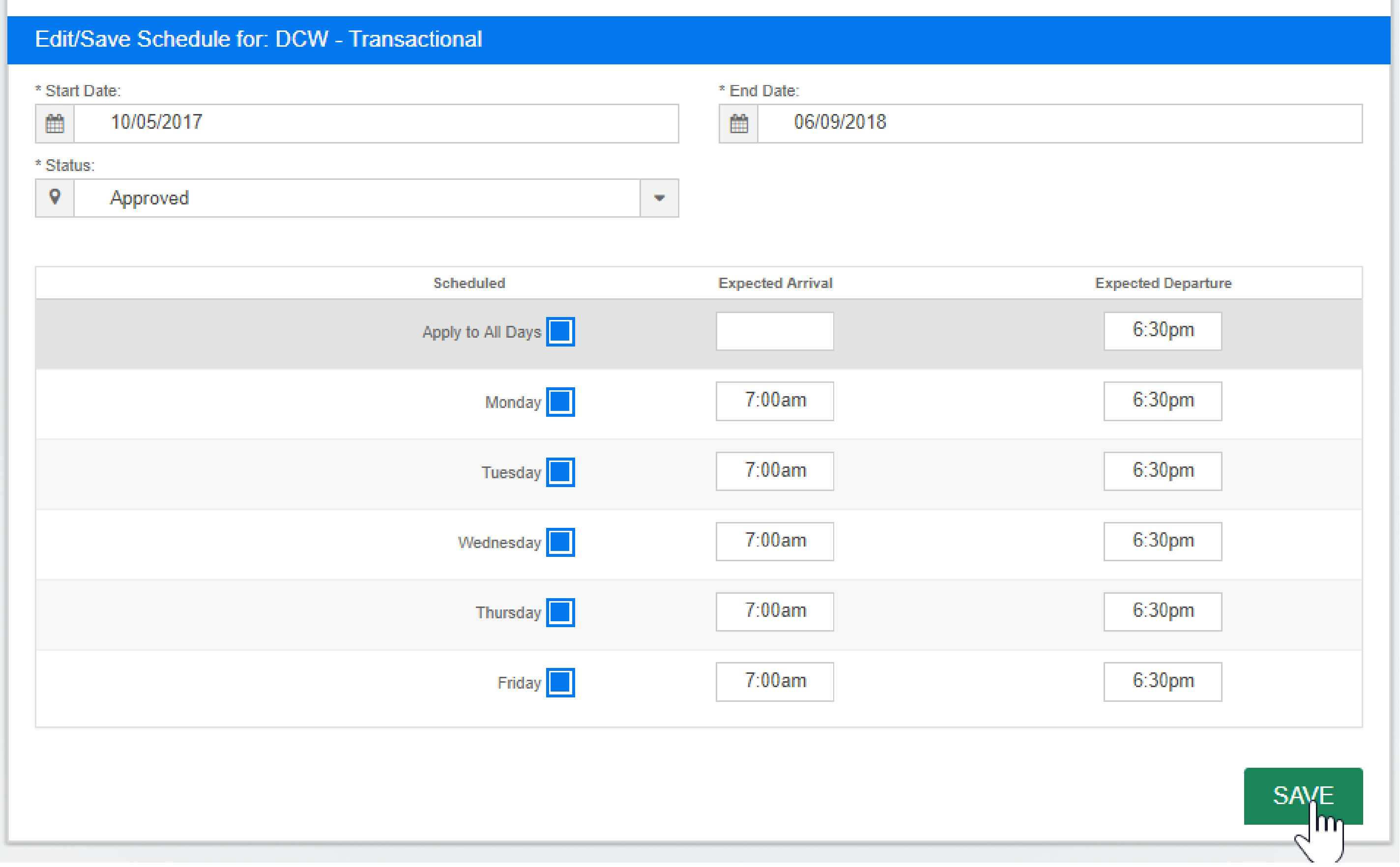
To edit a schedule select the edit icon to the left of the start date.



Center Schedule: DCW - Transactional

	Start Date	End Date	M	T	W	Th	F	
	10/05/2017	06/09/2018	✓ 7:00AM-6:00PM	✓7:00AM-6:00PM	✓7:00AM-6:00PM	✓7:00AM-6:00PM	✓7:00AM-6:00PM	

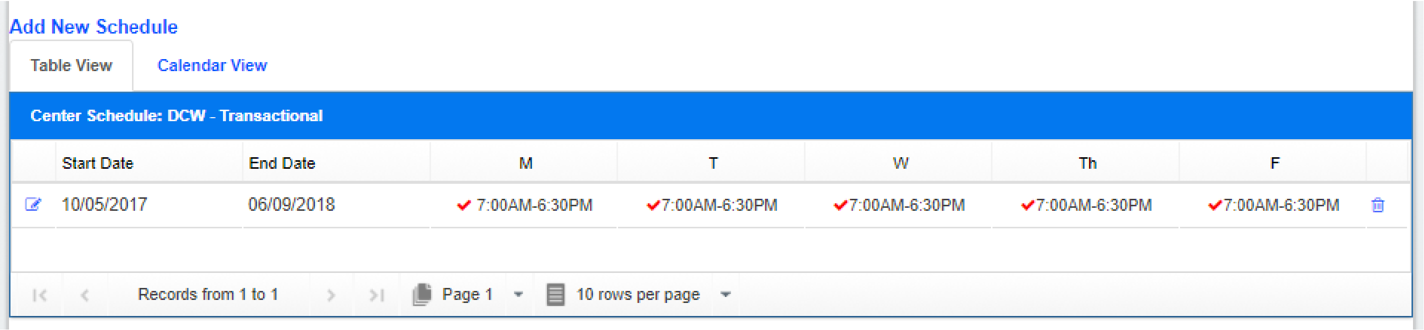
This will open the schedule below the Center Schedule box, make edits as needed, then press save.


Edit/Save Schedule for: DCW - Transactional

* Start Date: 10/05/2017
* End Date: 06/09/2018
* Status: Approved

Scheduled	Expected Arrival	Expected Departure
Apply to All Days ☑		6:30pm
Monday ☑	7:00am	6:30pm
Tuesday ☑	7:00am	6:30pm
Wednesday ☑	7:00am	6:30pm
Thursday ☑	7:00am	6:30pm
Friday ☑	7:00am	6:30pm

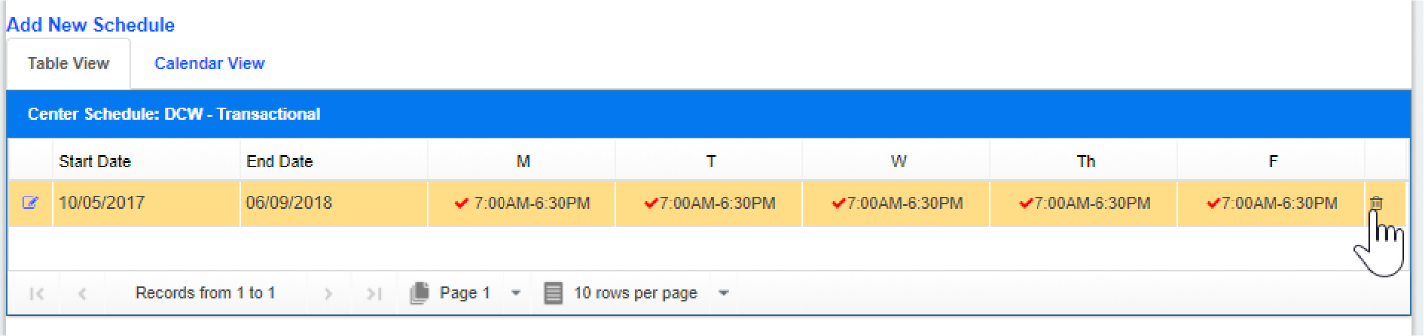
The changes display-



Center Schedule: DCW - Transactional

	Start Date	End Date	M	T	W	Th	F	
	10/05/2017	06/09/2018	✓7:00AM-6:30PM	✓7:00AM-6:30PM	✓7:00AM-6:30PM	✓7:00AM-6:30PM	✓7:00AM-6:30PM	

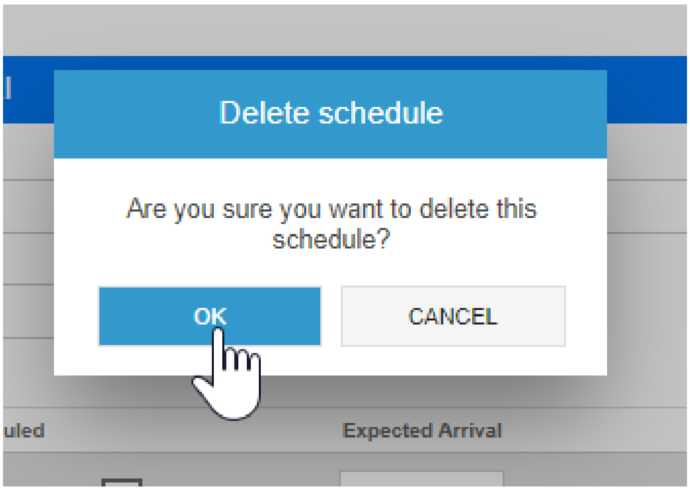
To delete an hours schedule select the trash icon.



Center Schedule: DCW - Transactional

	Start Date	End Date	M	T	W	Th	F	
	10/05/2017	06/09/2018	✓7:00AM-6:30PM	✓7:00AM-6:30PM	✓7:00AM-6:30PM	✓7:00AM-6:30PM	✓7:00AM-6:30PM	

Once the trash icon is selected, a confirmation box will open. Select Ok to delete the schedule, select Cancel if the schedule should not be deleted.



Are you sure you want to delete this schedule?

A couple of items to note:

- Hours can be added for the school year and for summer.
- Best practices would suggest to only have one schedule at a time per time frame (no overlapping dates).
- Hours need to be setup if you would like for the system to charge a late pickup fee.

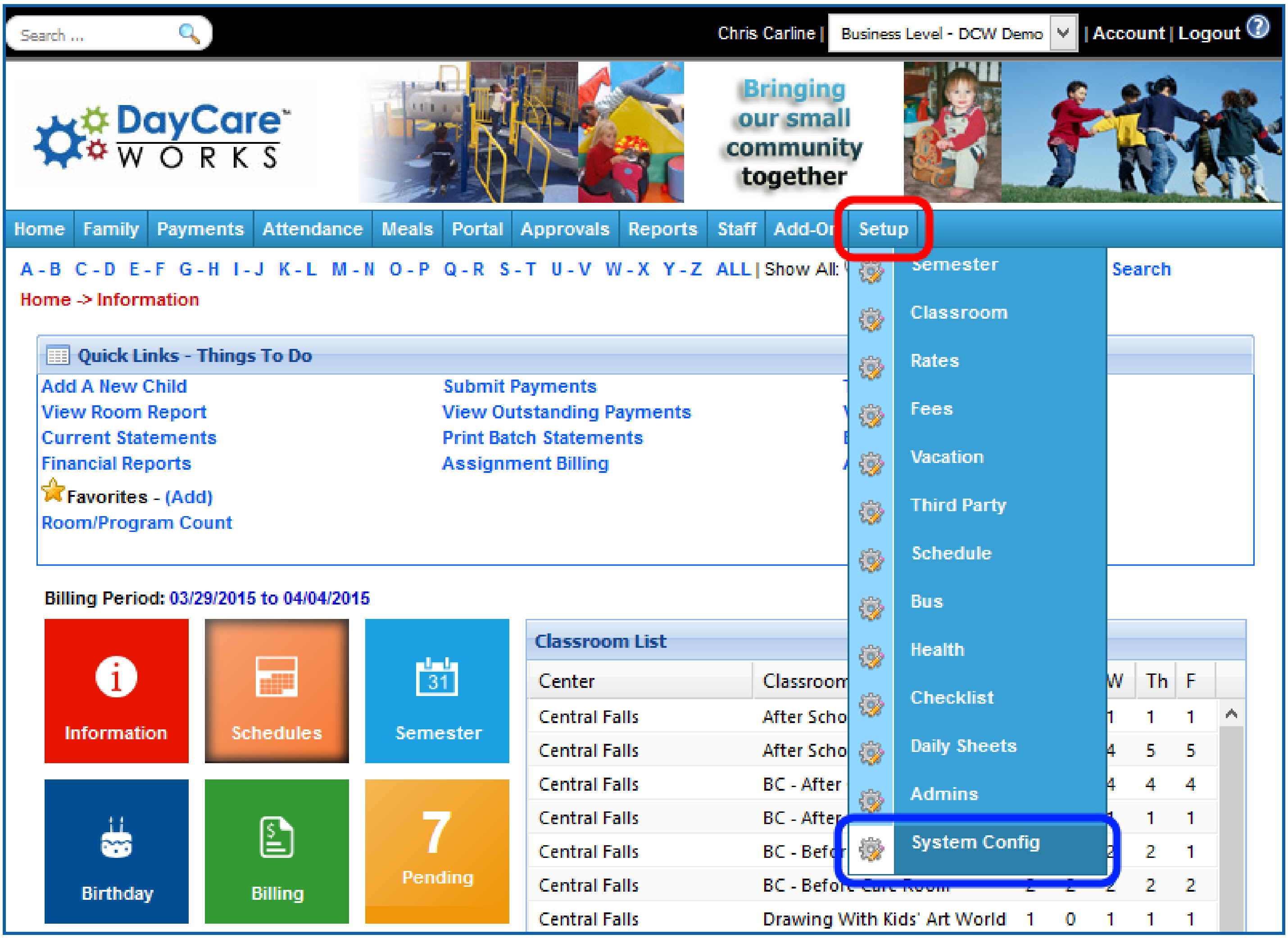
Setup- How do I setup a type- fee valid value?

Last Modified on 06/28/2018 3:42 pm EDT

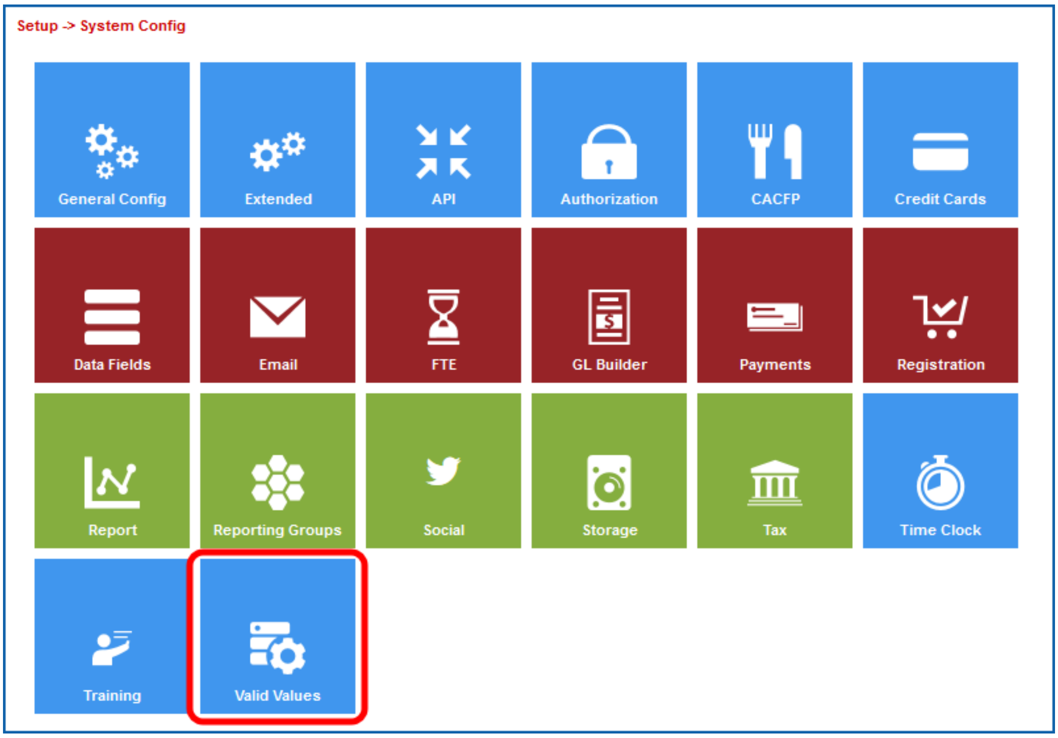
How to Setup a Type - Fee Valid Value: The **Type – Fee** valid value allows centers to setup fees or charges that will be assigned to a parent's financial ledger. Setting up a **Type – Fee** valid value is necessary for coupons to be able to determine what charge will be applied against the coupon's discount.

By default, the system already has several **Type - Fee** valid values that are already setup; however if a new **Type - Fee** valid value is saved, this will override the defaults and display only the **Type - Fee** valid values that have been setup by an administrator. **Type - Fee** valid values can also be assigned specific role based security that can limit who can post a transaction with the **Type - Fee** valid value and how large the transaction can be.

Click on the **Setup** tab on the main toolbar, *indicated by the red square*. Then, click on the **System Config** tab, *indicated by the blue square*.



Click on the **Valid Values** tile.

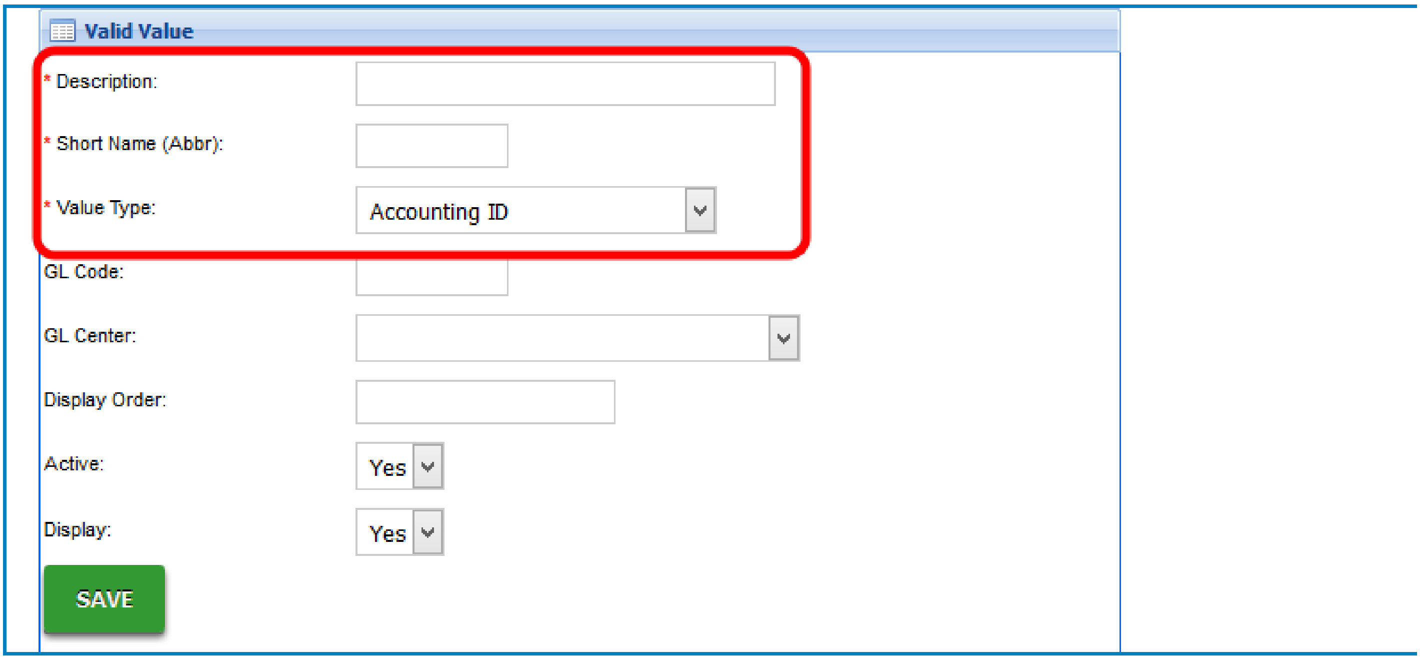


Next, scroll down to the **Valid Value** section at the bottom of the screen.

Then, enter the name of the type-fee in the **Description** text box.

Next, enter an abbreviated name for the type-fee in the **Short Name (Abbr)** text box.

Then, select **Type - Fee** in the **Value Type** drop down list. After selecting **Type - Fee**, the screen will refresh, displaying additional fields for the valid value.



Valid Value

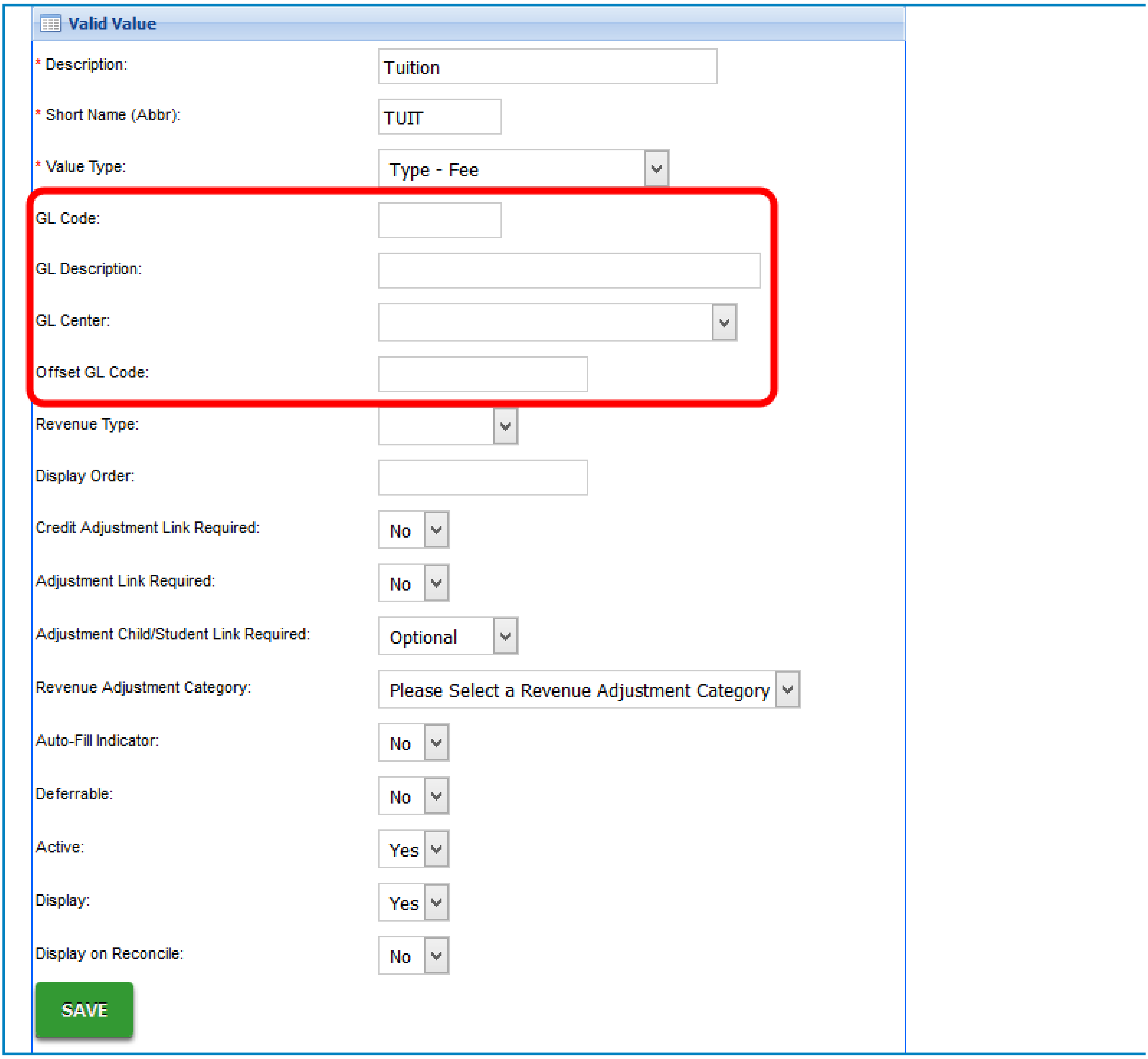
* Description:
* Short Name (Abbr):
* Value Type: Accounting ID
GL Code:
GL Center:
Display Order:
Active: Yes
Display: Yes

Next, enter the general ledger code for the **Type - Fee** in the **GL Code** text box. If the **GL Builder** is going to be used in the system, the **GL Code** for the **Type - Fee** valid value must correspond to the **GL Code Segment** entered on the **GL Builder**.

Click here for Additional GL Settings

If necessary, enter a description for the general ledger code in the **GL Description** text box.

If the business uses offsetting accounting, enter the offsetting general ledger code for the **Type - Fee** in the **Offset GL Code** text box.



Valid Value

* Description:	Tuition
* Short Name (Abbr):	TUIT
* Value Type:	Type - Fee
GL Code:	
GL Description:	
GL Center:	
Offset GL Code:	
Revenue Type:	
Display Order:	
Credit Adjustment Link Required:	No
Adjustment Link Required:	No
Adjustment Child/Student Link Required:	Optional
Revenue Adjustment Category:	Please Select a Revenue Adjustment Category
Auto-Fill Indicator:	No
Deferrable:	No
Active:	Yes
Display:	Yes
Display on Reconcile:	No

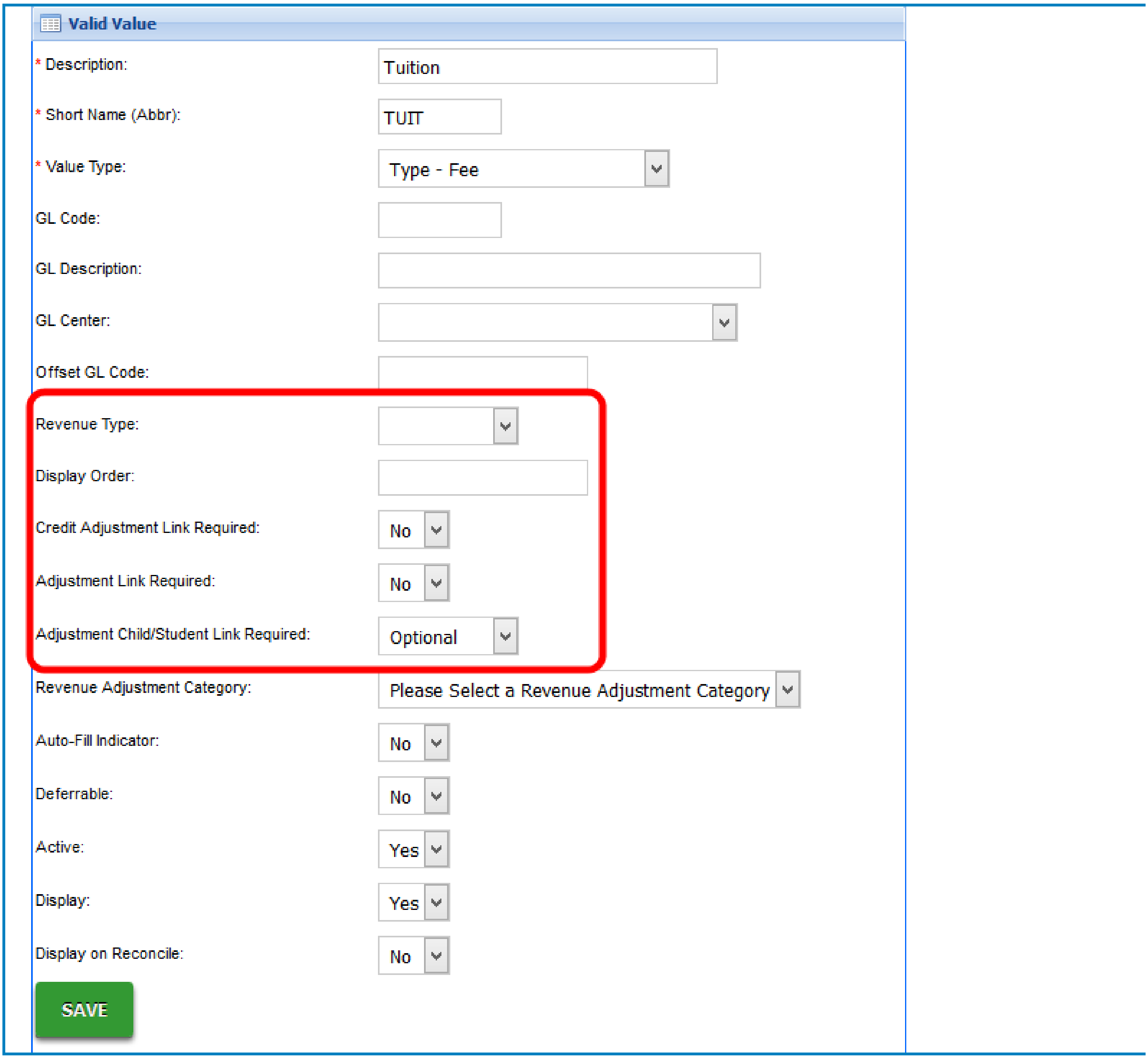
Then, if necessary, select the revenue type assigned to the **Type - Fee** in the **Revenue Type** drop down list. **Revenue Type** is a valid value and must be setup in the valid value section.

If necessary, enter the display order for **Type - Fee** in the **Display Order** text box.

Next, select **Yes** in the **Credit Adjustment Link Required** drop down list if a credit adjustment for the **Type - Fee** requires an association to a previously created adjustment.

Then, select **Yes** in the **Adjustment Link Required** drop down list if an association to a previous adjustment is required for any adjustment with this **Type - Fee**.

Next, select if the adjustment is required to be associated to a child in the **Adjustment/Child Student Link Required** drop down list.



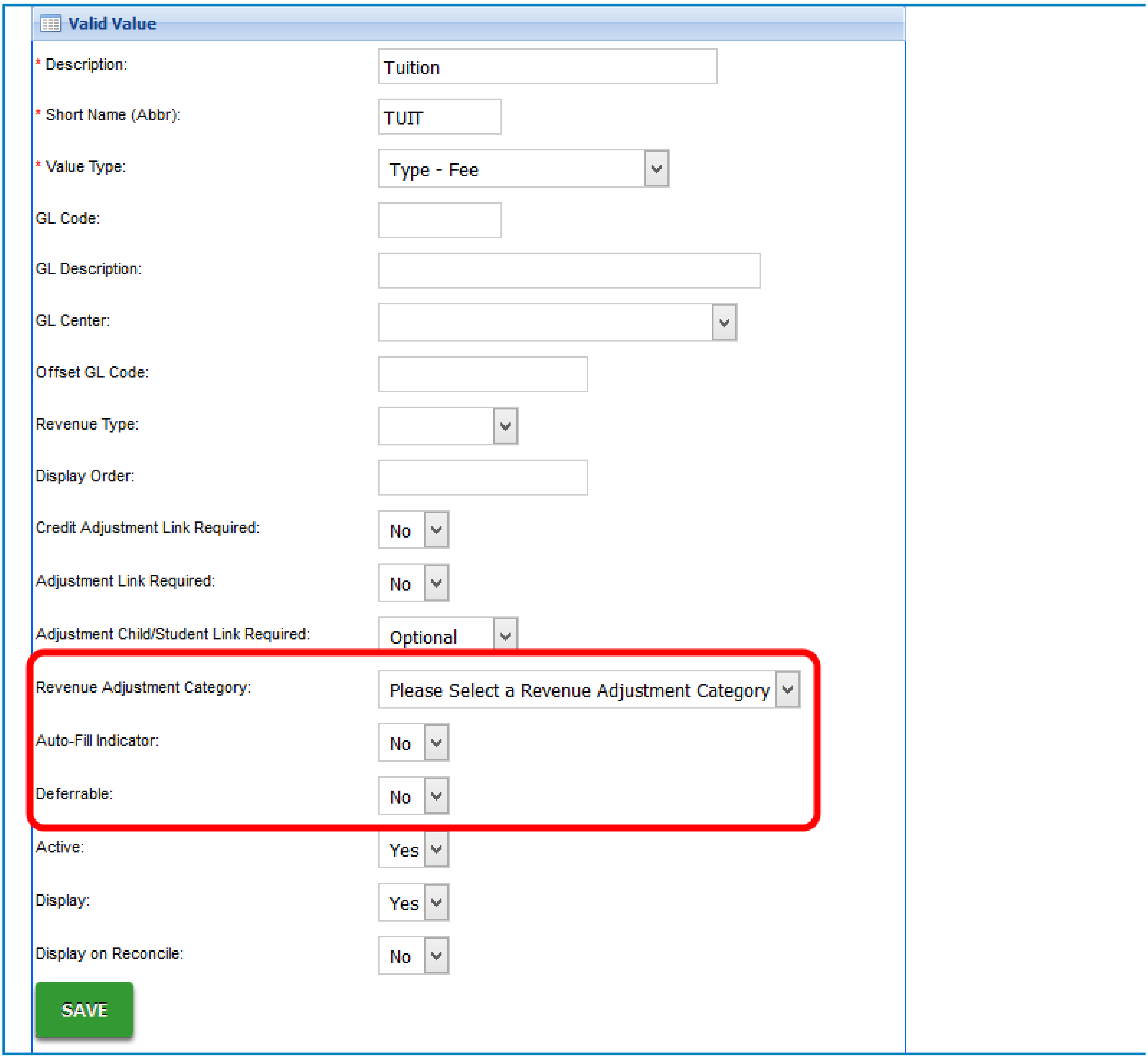
* Description:	Tuition
* Short Name (Abbr):	TUIT
* Value Type:	Type - Fee
GL Code:	
GL Description:	
GL Center:	
Offset GL Code:	
Revenue Type:	
Display Order:	
Credit Adjustment Link Required:	No
Adjustment Link Required:	No
Adjustment Child/Student Link Required:	Optional
Revenue Adjustment Category:	Please Select a Revenue Adjustment Category
Auto-Fill Indicator:	No
Deferrable:	No
Active:	Yes
Display:	Yes
Display on Reconcile:	No

If the **Type - Fee** valid value will be used to adjust revenue in the system, select the adjustment type in the **Revenue Adjustment Type** drop down list. This drop down list determines if the **Type - Fee** valid value will appear in the **Charge**section or **Reduce Revenue** section in the **Change/Reduce Revenue** section on a family's financial ledger. If this section will not be used, this section can be ignored.

- If the fee will be able to be charged and reduced by an administrator using the **Charge/Reduce**revenue section, select **Charge Revenue**.
- If the fee will only be able to be reduced by an administrator but will not be able to be charged using the **Charge/Reduce Revenue** section, select **Reduce Revenue**.
- If the fee will only be able to be used to write off outstanding balances and will not be able charge revenue, select **Write-Off Family Bad Debt**.

If the **Type - Fee** valid value is associated to a specific valid value and has a default adjustment amount, select **Yes** in the **Auto-Fill Indicator** drop down list. This is typically used to setup a default auto-fill indicator for registration fees in the system. If **Yes** is selected in the **Auto-Fill Indicator** drop down list, the **Charge/Reduce Revenue** section will have the **Adjustment Amount** grayed out, preventing the administrator from entering an amount. The text box will auto-populate based on the adjustment selected.

If the **Type - Fee** valid value is deferrable, select **Yes** in the **Deferrable** drop down list. By selecting **Yes** in the **Deferrable** drop down list, when a **Type - Fee** valid value is associated to a semester for a child, the amount charged will be spread out amongst the entire semester associated to the fee. This could be used to spread the charge of a registration across the entire semester for accounting purposes.

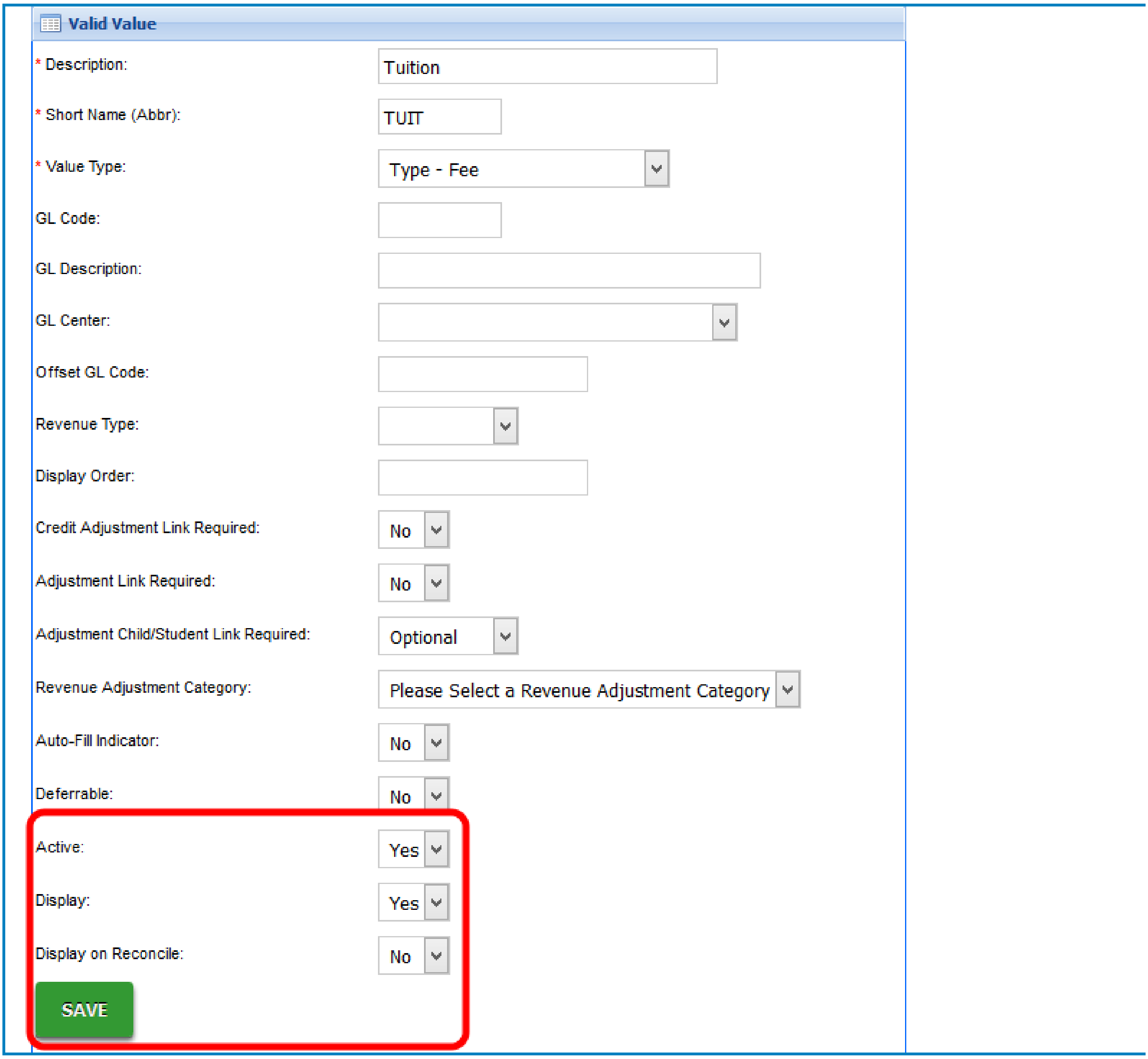


* Description:	Tuition
* Short Name (Abbr):	TUIT
* Value Type:	Type - Fee
GL Code:	
GL Description:	
GL Center:	
Offset GL Code:	
Revenue Type:	
Display Order:	
Credit Adjustment Link Required:	No
Adjustment Link Required:	No
Adjustment Child/Student Link Required:	Optional
Revenue Adjustment Category:	Please Select a Revenue Adjustment Category
Auto-Fill Indicator:	No
Deferrable:	No
Active:	Yes
Display:	Yes
Display on Reconcile:	No

Then, select **Yes** in the **Active** and **Display** drop down lists to make the valid value active and visible in the system.

If the **Type - Fee** valid value will be used to edit a third party agency's outstanding balance during a third party reconciliation, select **Yes** in the **Display on Reconcile** drop down list.

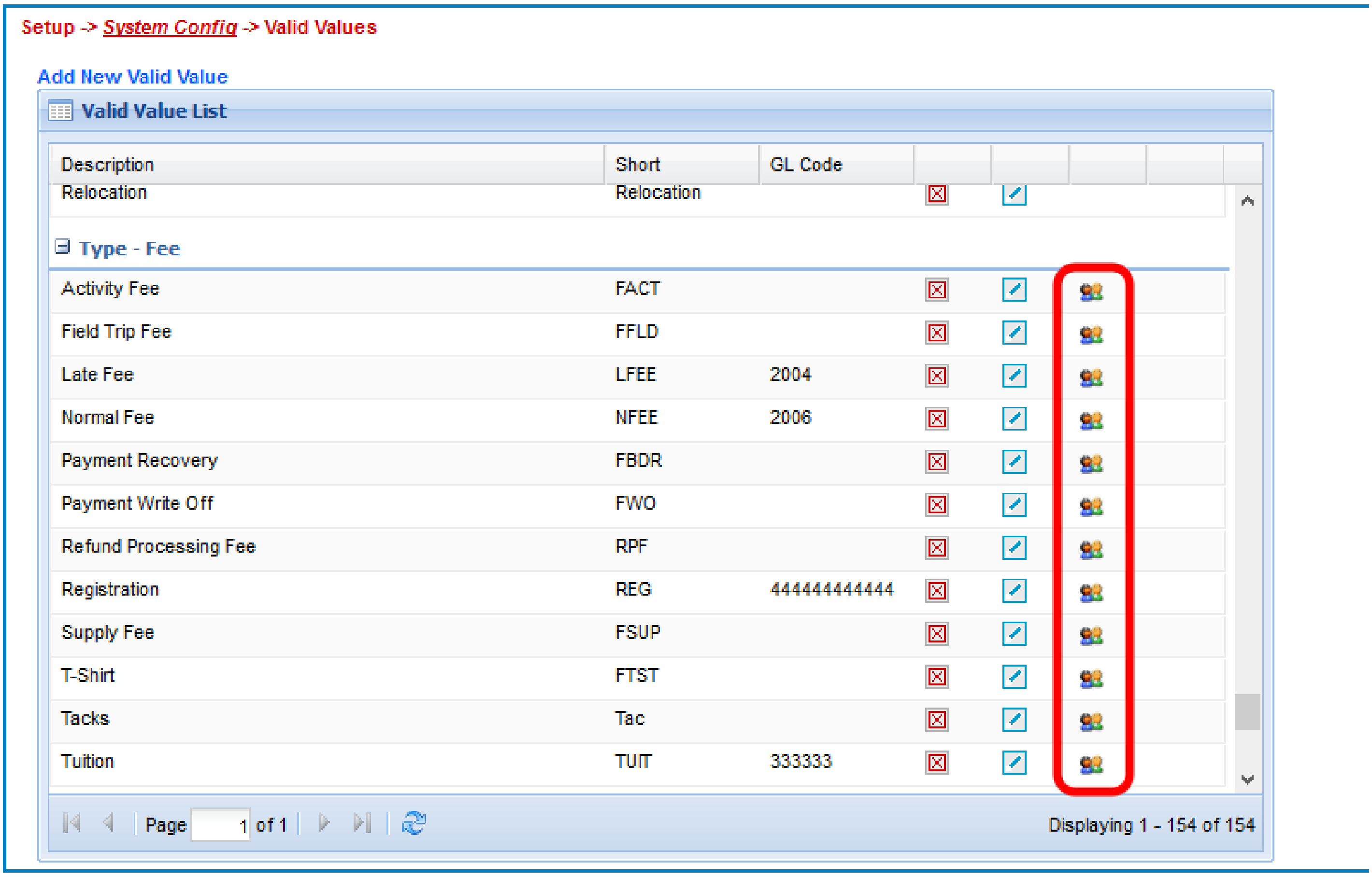
When finished, click on the **Save** button.



* Description:	Tuition
* Short Name (Abbr):	TUIT
* Value Type:	Type - Fee
GL Code:	
GL Description:	
GL Center:	
Offset GL Code:	
Revenue Type:	
Display Order:	
Credit Adjustment Link Required:	No
Adjustment Link Required:	No
Adjustment Child/Student Link Required:	Optional
Revenue Adjustment Category:	Please Select a Revenue Adjustment Category
Auto-Fill Indicator:	No
Deferrable:	No
Active:	Yes
Display:	Yes
Display on Reconcile:	No

After clicking on the **Save** button, the screen will refresh, displaying the new **Type - Fee** in the valid values section.

Next, click on the **Role icon** for the valid value. This will setup role security around the **Type - Fee** valid value.



Setup -> System Config -> Valid Values

Add New Valid Value

Valid Value List

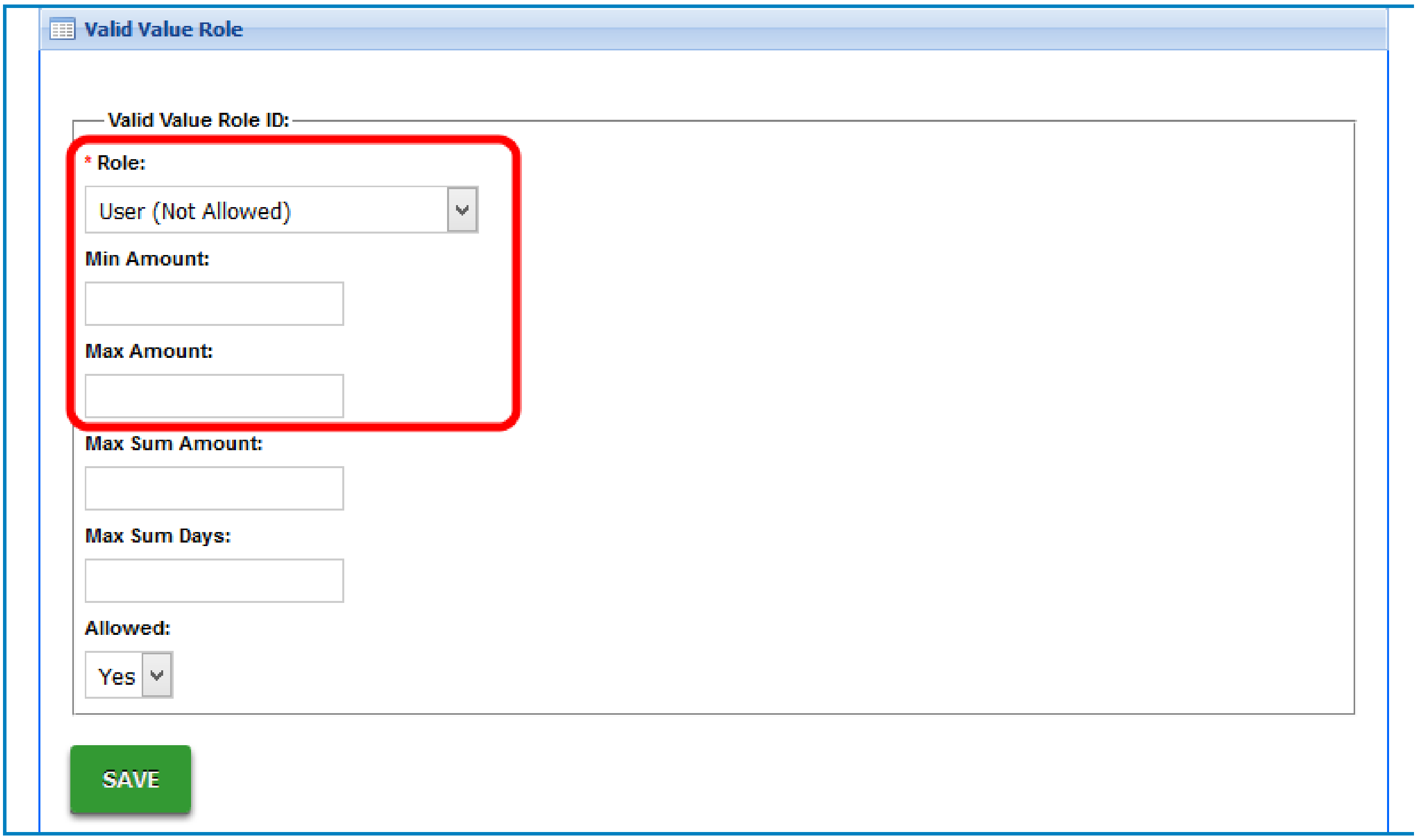
Description	Short	GL Code				
Relocation	Relocation		☒	✎		
⊟ Type - Fee						
Activity Fee	FACT		☒	✎	👥	
Field Trip Fee	FFLD		☒	✎	👥	
Late Fee	LFEE	2004	☒	✎	👥	
Normal Fee	NFEE	2006	☒	✎	👥	
Payment Recovery	FBDR		☒	✎	👥	
Payment Write Off	FWO		☒	✎	👥	
Refund Processing Fee	RPF		☒	✎	👥	
Registration	REG	444444444444	☒	✎	👥	
Supply Fee	FSUP		☒	✎	👥	
T-Shirt	FTST		☒	✎	👥	
Tacks	Tac		☒	✎	👥	
Tuition	TUIT	333333	☒	✎	👥	

Page 1 of 1

Displaying 1 - 154 of 154

Next, select the administrator role that will be assigned this security in the **Role** drop down list. These roles are assigned to administrators in the system using the **Setup Admin** section.

Then, enter the minimum and maximum amount that can be applied by an administrator of this role in a single transaction in the **Min Amount** and **Max Amount** text boxes.



* Role: User (Not Allowed)

Allowed: Yes

Next, enter the maximum amount that an administrator can post of this transaction in the **Max Sum Amount** text box and then enter the total number of days to calculate the **Max Sum Amount** in the **Max Sum Days**.

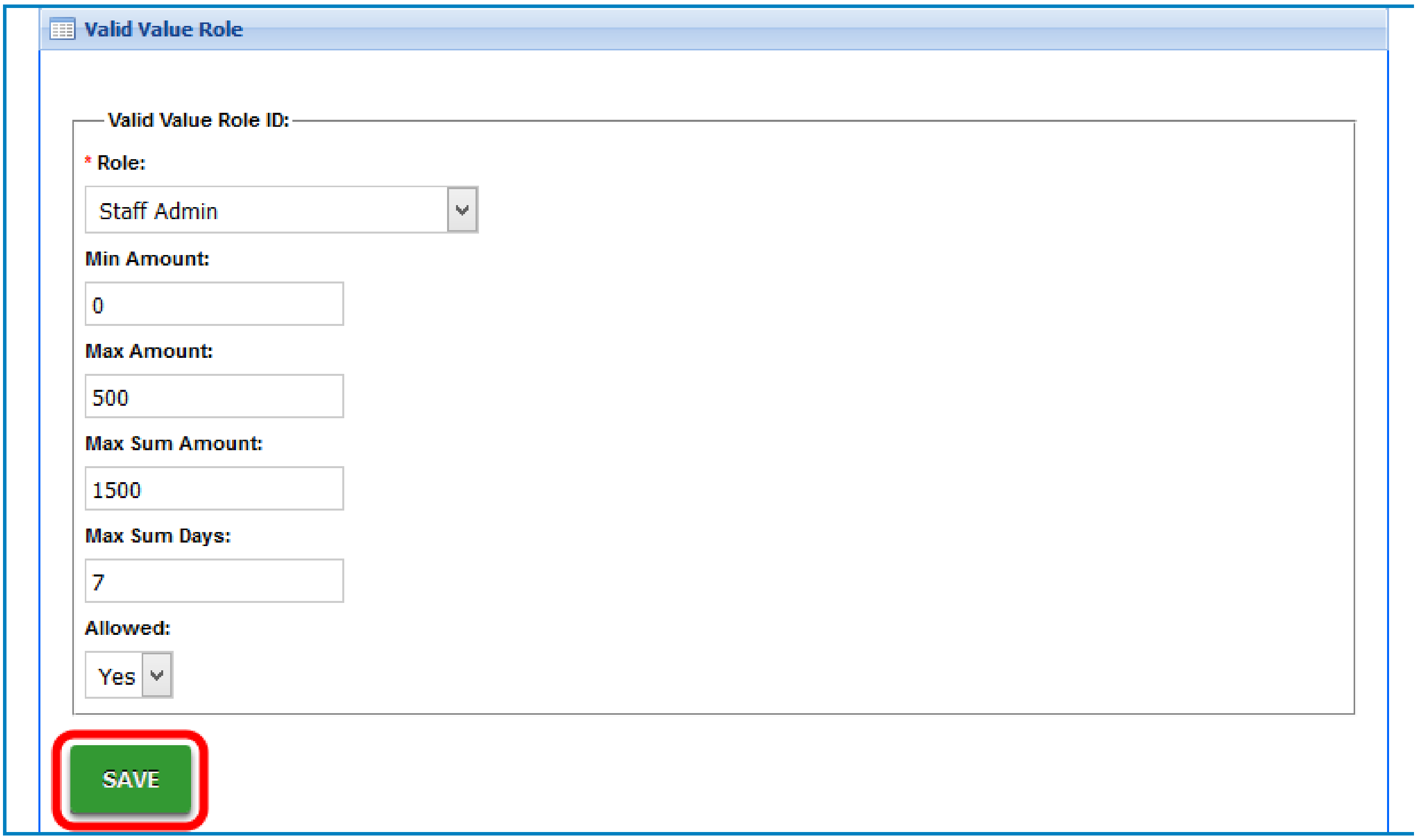
*For example, if an administrator is only allowed to post **$100.00** of a **Type - Fee Credit** to all families in the system in a 5 day span, enter **$100.00** in the **Max Sum Amount** text box and then enter **5** in the **Max Sum Days** text box.*

Then, select if the administrator is able to post a transaction using this **Type - Fee** valid value in the **Allowed** drop down list. If a specific **Type - Fee** valid value is not allowed to be posted by a specific role type, select the role in the **Role** drop down list and then select **No** in the **Allowed** drop down list.

When finished, click on the **Save** button. When finished, the screen will refresh, indicating a successful save. If necessary, repeat **Step Six** and **Step Seven** to add additional role security to the **Type - Fee**.

Example

*In this example, a administrator assigned to role of **Staff Admin** is only allowed to post a **Type - Fee Tuition** of between **$0.00** and **$500.00** on a family's financial ledger. In a span of **7** days, the administrator is only able to post a total of **$1500.00 Type - Fee Tuition** to all financial ledgers. This will not let the **Staff Admin** post a credit to the family's financial ledger for **Tuition**.*



Valid Value Role ID:

* Role: Staff Admin

Min Amount: 0

Max Amount: 500

Max Sum Amount: 1500

Max Sum Days: 7

Allowed: Yes

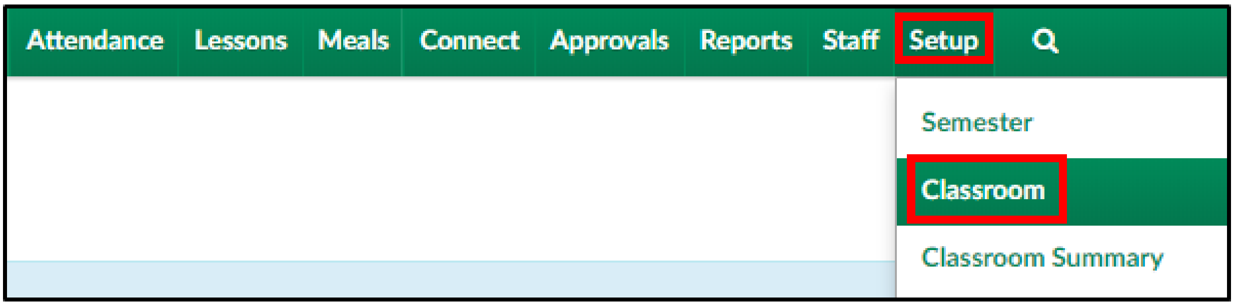
Creating a Wait List Room

Last Modified on 12/04/2018 9:30 am EST

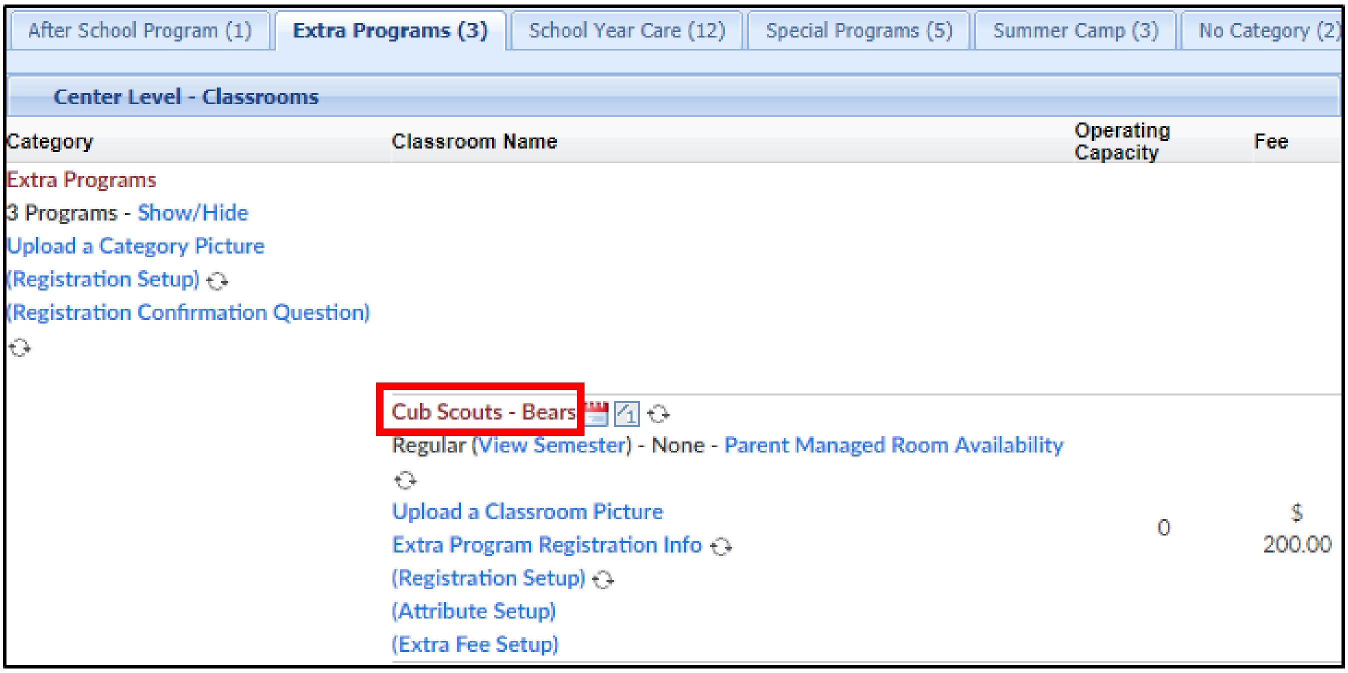
The system has the ability to add students to a Wait List for many reasons, see instructions and scenarios below:

Wait List Room Settings

1. To enable the wait list on a room, click Setup from the menu, then select Classroom



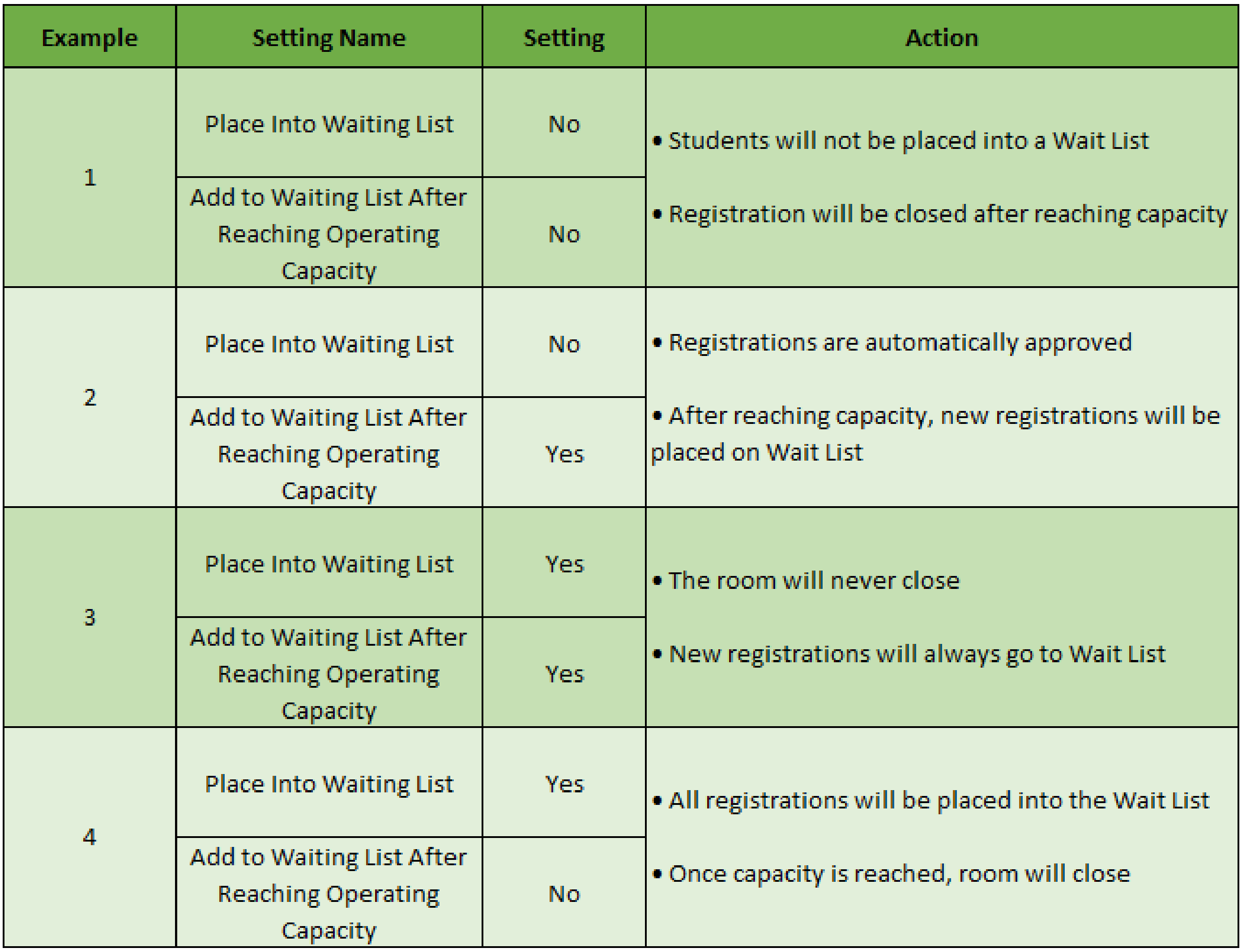
2. Click the classroom name



3. Locate the following fields:
    - Operating Capacity - enter the total spaces available before students are added into the wait list, if applicable. **Please Note**: for an unlimited capacity, enter zero
    - Place Into Waiting List
        - Yes - this option will place <u>all</u> student registrations into the wait list, no

        matter the capacity. Administrators will have to manually approve all registrations into this room
        - No - students will be added into the room and not placed on the wait list
    - Add to Waiting List After Reaching Operating Capacity
        - Yes - once room capacity has been reached, all new student registrations will be placed on the wait list for approval
        - No - once capacity is reached, the room will close

Scenarios

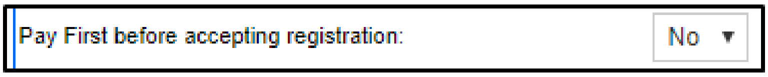


Example	Setting Name	Setting	Action
1	Place Into Waiting List	No	• Students will not be placed into a Wait List • Registration will be closed after reaching capacity
	Add to Waiting List After Reaching Operating Capacity	No	
2	Place Into Waiting List	No	• Registrations are automatically approved • After reaching capacity, new registrations will be placed on Wait List
	Add to Waiting List After Reaching Operating Capacity	Yes	
3	Place Into Waiting List	Yes	• The room will never close • New registrations will always go to Wait List
	Add to Waiting List After Reaching Operating Capacity	Yes	
4	Place Into Waiting List	Yes	• All registrations will be placed into the Wait List • Once capacity is reached, room will close
	Add to Waiting List After Reaching Operating Capacity	No	

Wait List Facts

Things to note about this process-

- The registration fee will be charged and require payment upon registration, unless the Pay First before accepting Registration field is set to No



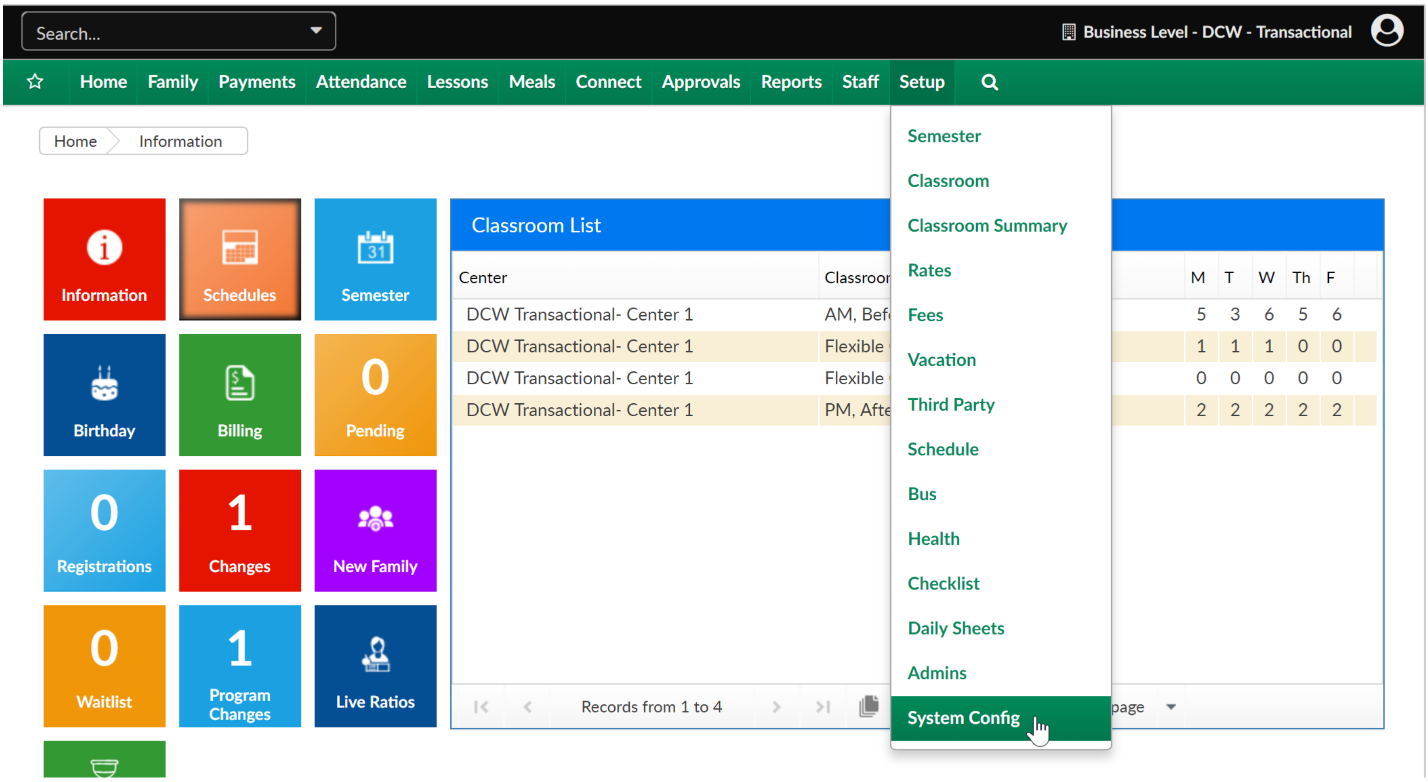
Pay First before accepting registration: No

- Parents will receive the same notifications they would normally receive for registering. This means a site may want to include verbiage to have parents confirm their program assignments by signing into the portal and going to the Attendance tab
- The capacity will display as the total number on the waiting list / total capacity. This means that on the wait list tile, when approving, it may look like more students are associated to the program than have actually been approved. To see a full, complete list of children registered for a program/semester go to reports > room/program, then pull the student schedule summary- select the center/category/room based on the data that should be displayed in the report

Setup- How do I add a payment type to the system?

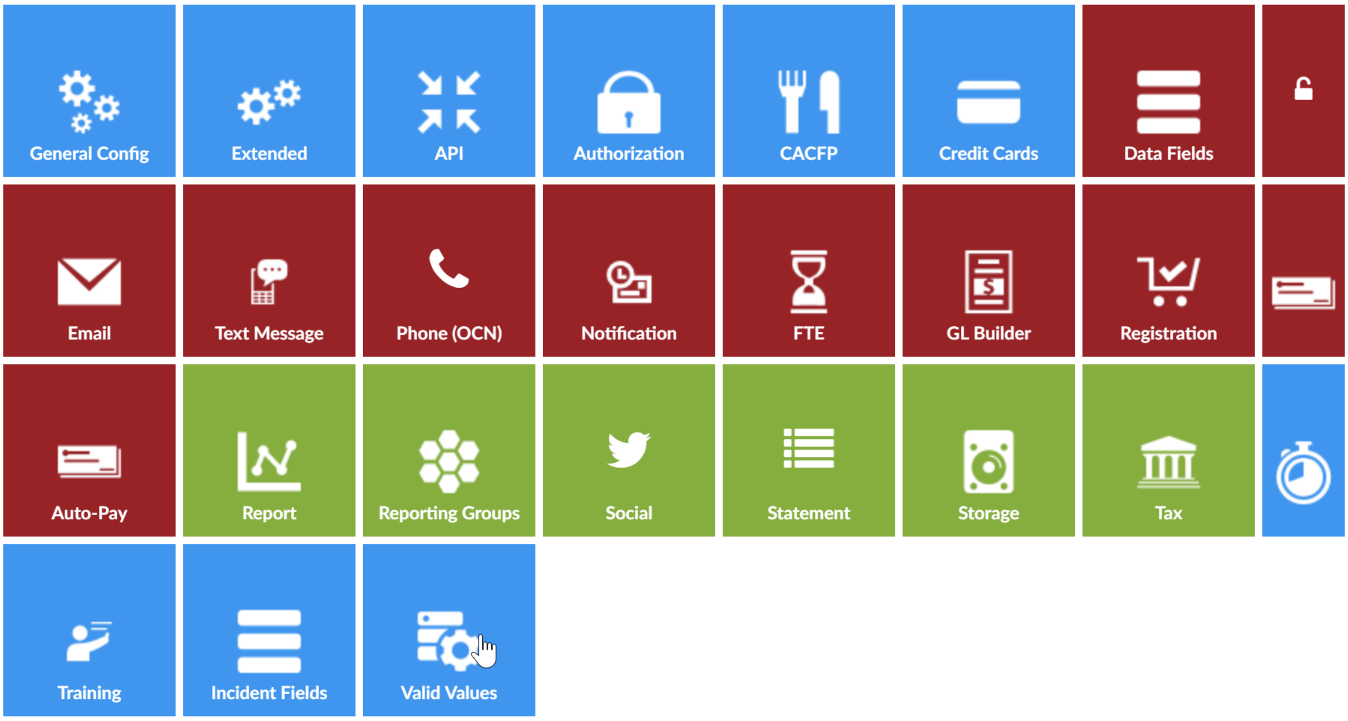
Last Modified on 06/28/2018 3:54 pm EDT

Payment types are added to the system by going to setup > system config, valid values.

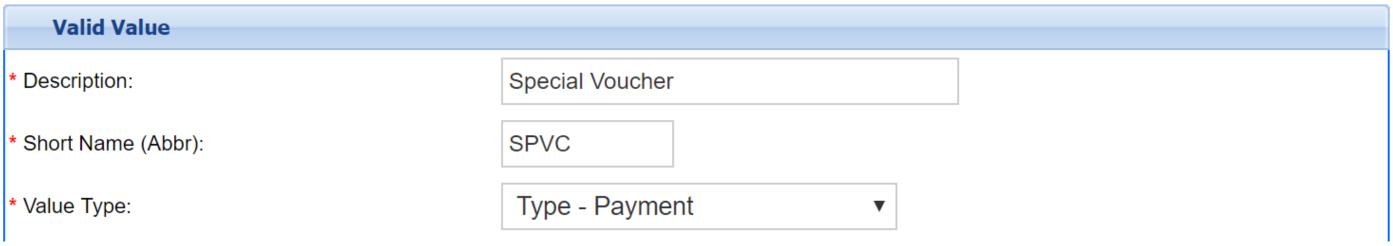


Then select valid values-

Setup -> System Config



Scroll to the blank Valid Value fields and enter the description and short name for the payment type you are entering and then change the value type to type- payment.



Valid Value

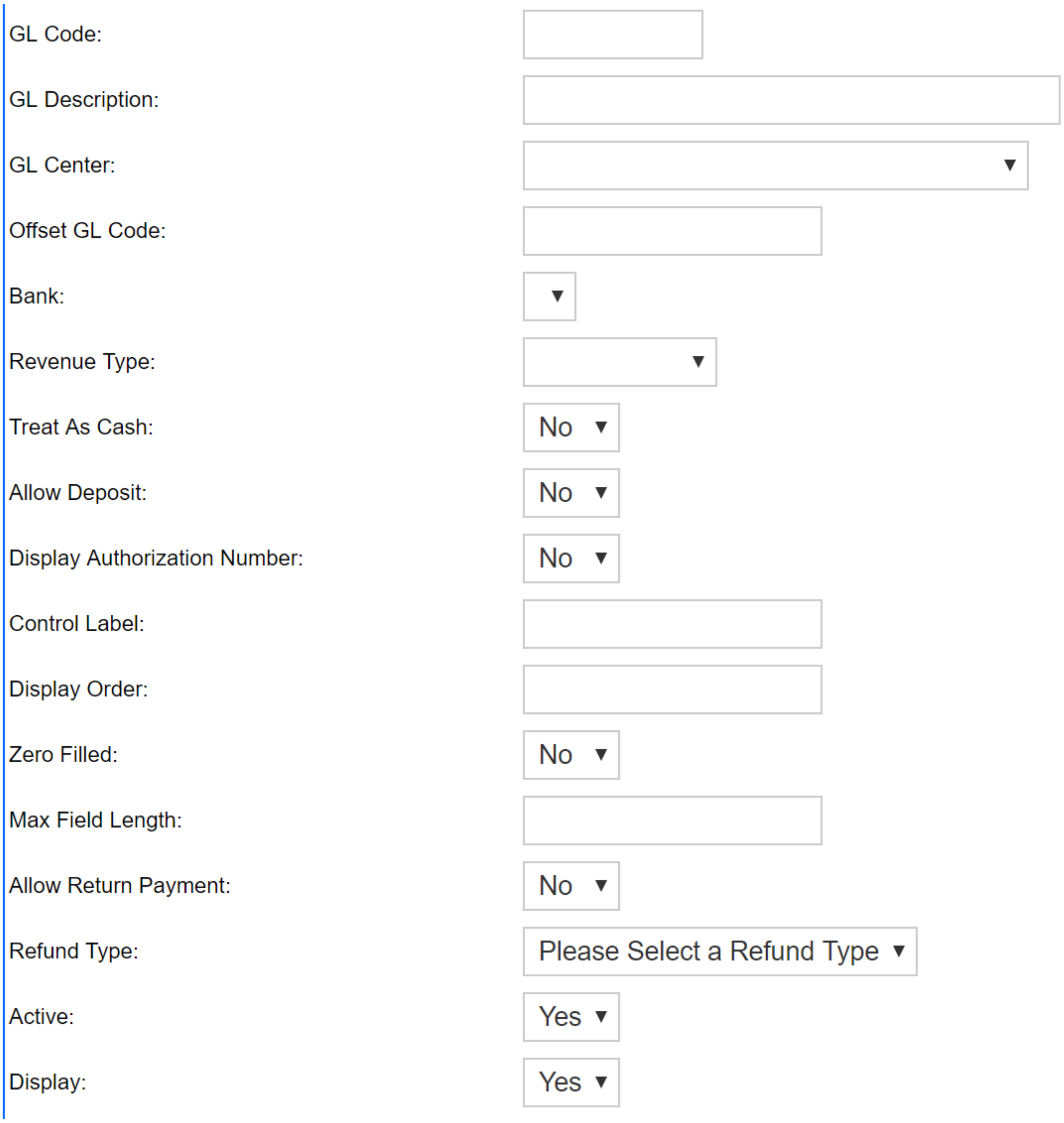
* Description:	Special Voucher
* Short Name (Abbr):	SPVC
* Value Type:	Type - Payment

The rest of the fields are optional- fill out as many or few of them as desired.

- GL Code- this should be a short code that has been setup under setup > system config, GL builder
- GL Description- if you want to enter in a name for the GL code being used
- GL Center- select a center if you want to reference a specific site when using the valid value
- Offset GL code- this should be a short code that has been setup under setup > system config, GL builder
- Bank- this field will only display options if you have added bank type valid values
- Revenue Type- if you want to reference a specific type of revenue when the

payment is being receipted. If you want to have additional options for revenue types, add revenue type valid values.

- Treat as Cash- mark yes if you would like for the payment type to display on year end statements given to parents for tax purposes.
- Allow Deposit- mark yes if you would like to receipt payments in batch format on the Payments > Deposit screen
- Display Authorization Number
- Control Label
- Display Order- enter a numeric value for the order you would like your type-payments to display in
- Max Field Length- enter a numeric value if there is a max length in how many numbers a payment can be
- Allow Return Payment - select yes if you want to be able to return the payment, which will automatically place a returned fee on the family ledger as well
- Refund Type
- Active- Select Yes if the payment type is currently in use
- Display- Select Yes if you want the payment type to display as an option when receipting payments.



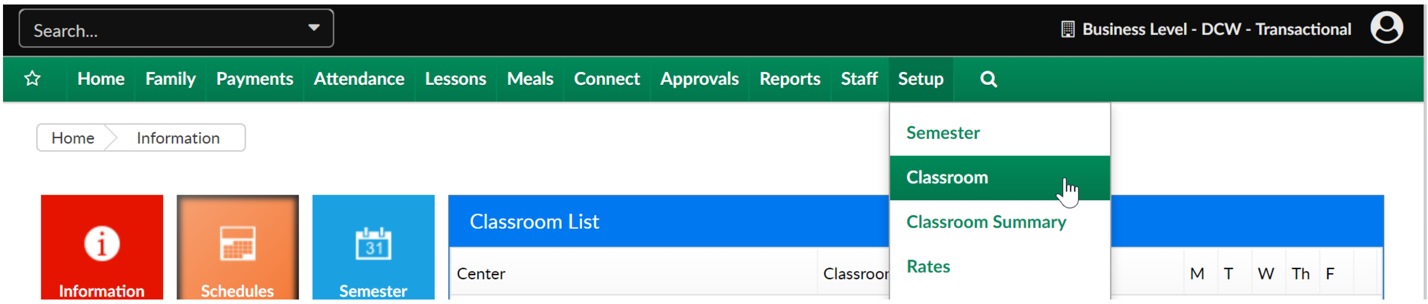
GL Code:
GL Description:
GL Center:
Offset GL Code:
Bank:
Revenue Type:
Treat As Cash: No
Allow Deposit: No
Display Authorization Number: No
Control Label:
Display Order:
Zero Filled: No
Max Field Length:
Allow Return Payment: No
Refund Type: Please Select a Refund Type
Active: Yes
Display: Yes

Setup- How do I require credit card information be saved with registration?

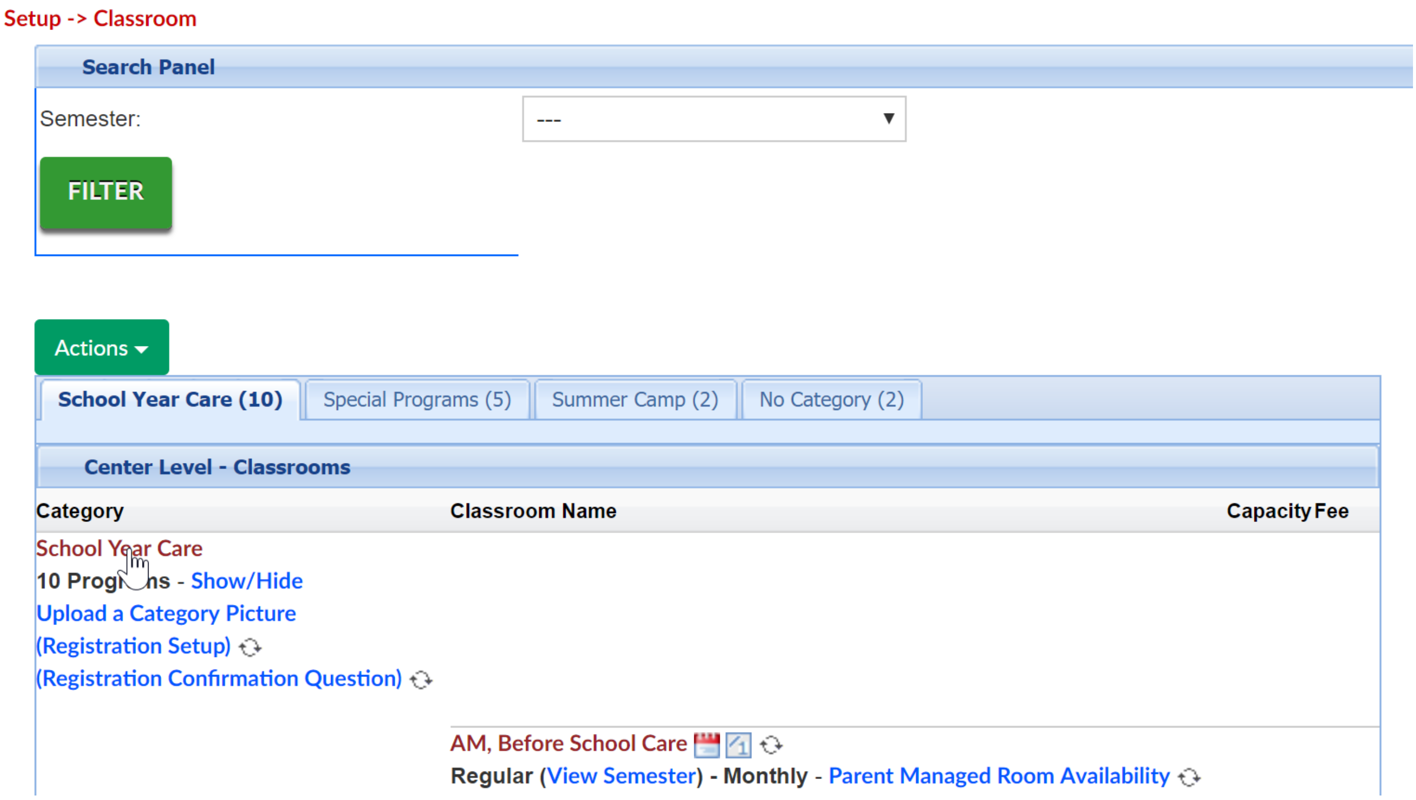
Last Modified on 06/28/2018 3:55 pm EDT

The requirement for credit card/payment detail to be saved from the registration page can be edited at the category level.

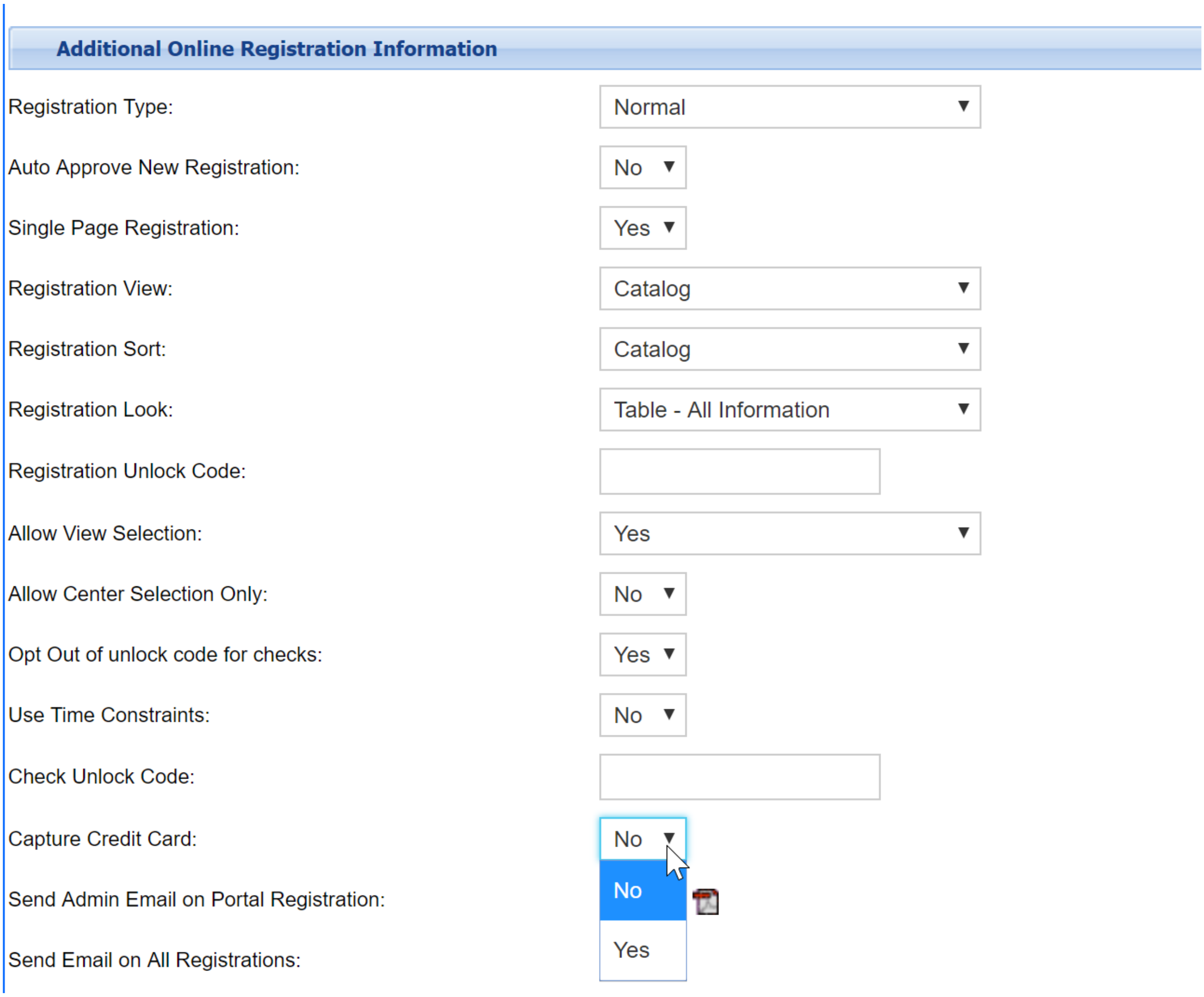
Go to setup > room



Then select the name of one of your categories.



Scroll to the capture credit card field and select yes, then save.



Additional Online Registration Information

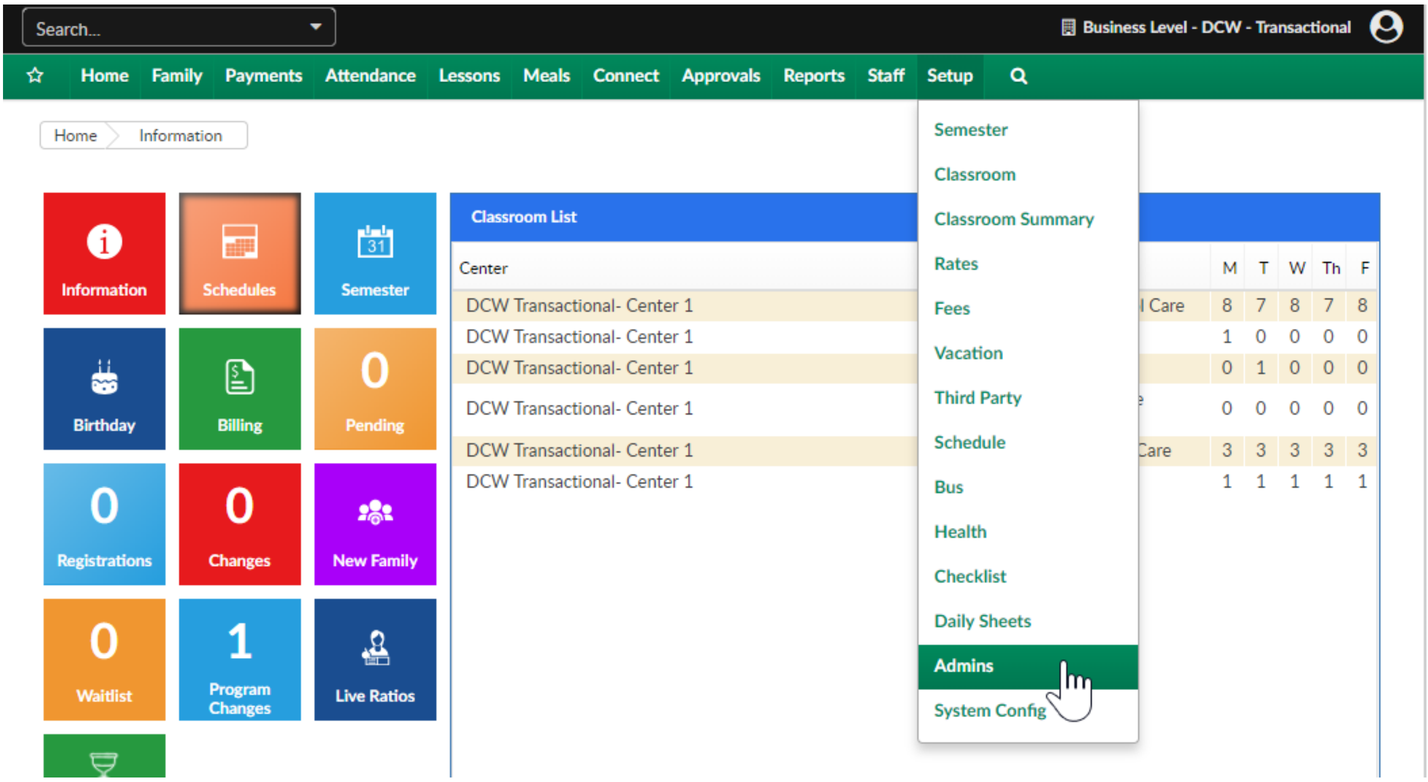
Registration Type:	Normal
Auto Approve New Registration:	No
Single Page Registration:	Yes
Registration View:	Catalog
Registration Sort:	Catalog
Registration Look:	Table - All Information
Registration Unlock Code:	
Allow View Selection:	Yes
Allow Center Selection Only:	No
Opt Out of unlock code for checks:	Yes
Use Time Constraints:	No
Check Unlock Code:	
Capture Credit Card:	No
Send Admin Email on Portal Registration:	
Send Email on All Registrations:	

This will save the family's payment method to their account- but will not automatically set the family up for auto payment. The payment detail can be edited from the family record's autopay tab by an admin or through the parent portal by the family.

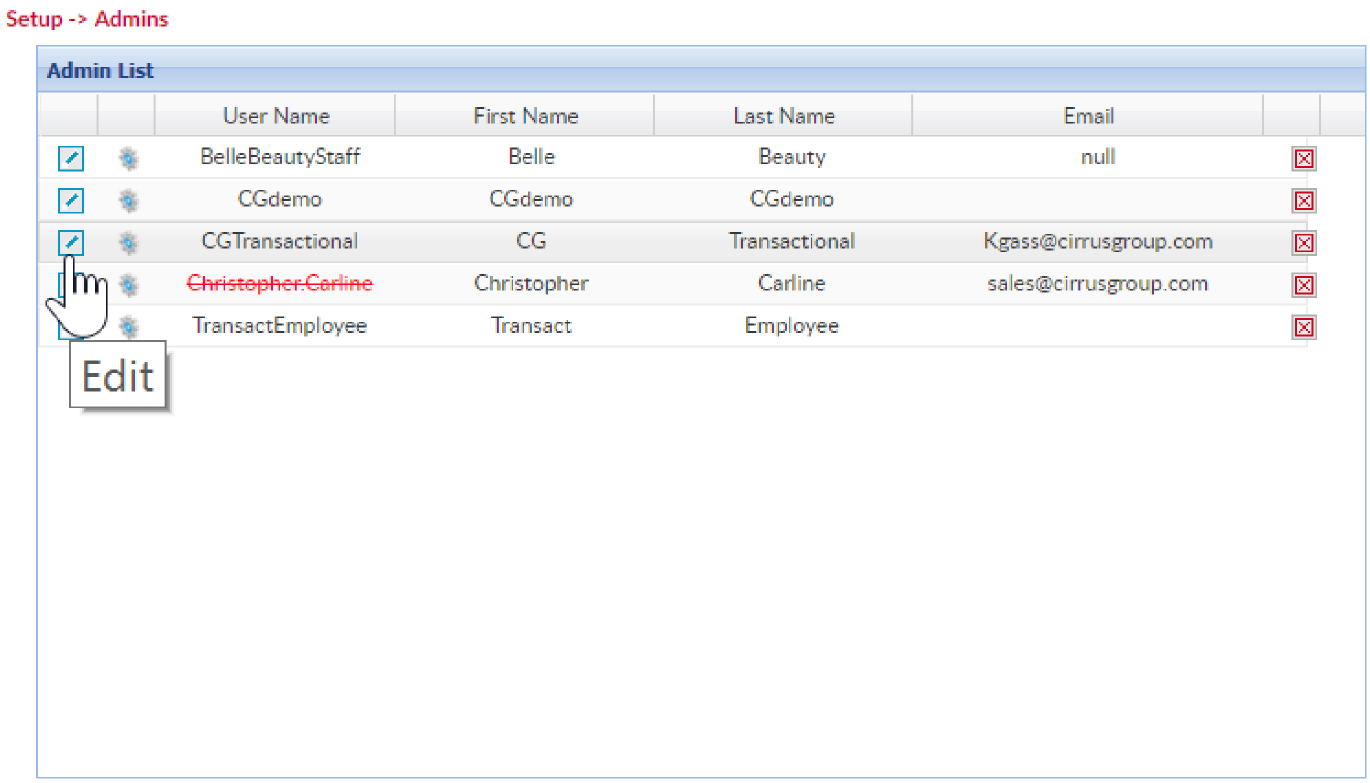
Admins- How do I change a user's password?

Last Modified on 01/09/2018 3:38 pm EST

To change an admin user's password, go to the select menu then select the admin option.



On the admin screen, select the edit icon next to the user's name.

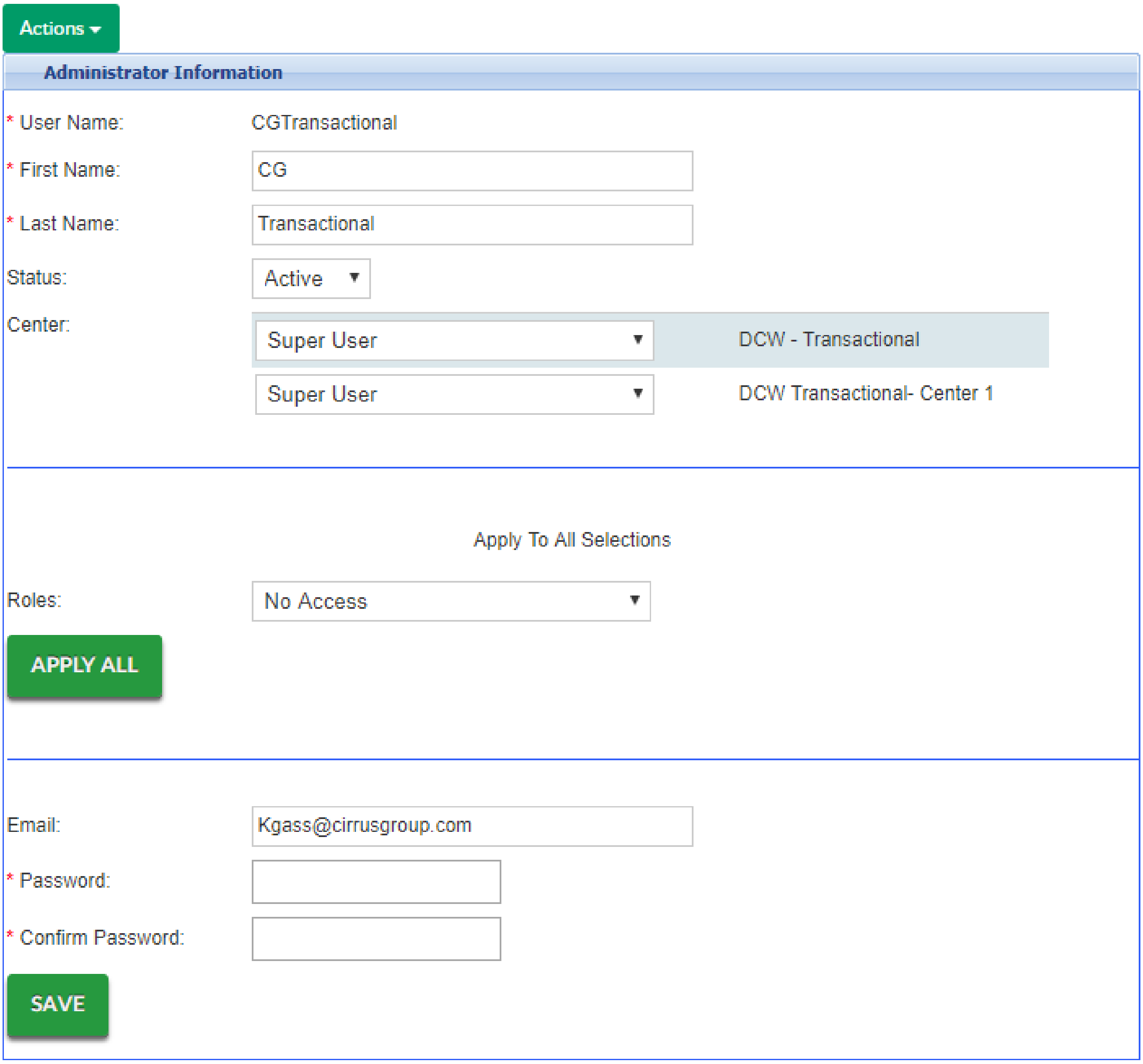


Setup -> Admins

Admin List

		User Name	First Name	Last Name	Email	
✎	⚙	BelleBeautyStaff	Belle	Beauty	null	☒
✎	⚙	CGdemo	CGdemo	CGdemo		☒
✎	⚙	CGTransactional	CG	Transactional	Kgass@cirrusgroup.com	☒
✎	⚙	~~Christopher.Carline~~	Christopher	Carline	sales@cirrusgroup.com	☒
✎	⚙	TransactEmployee	Transact	Employee		☒

Scroll to to the password section enter a new password, then enter the password in the confirm password field. Press Save.



* User Name: CGTransactional

* First Name: CG

* Last Name: Transactional

Status: Active

Center:

Super User	DCW - Transactional
Super User	DCW Transactional- Center 1

Roles: No Access

Email: Kgass@cirrusgroup.com

* Password:

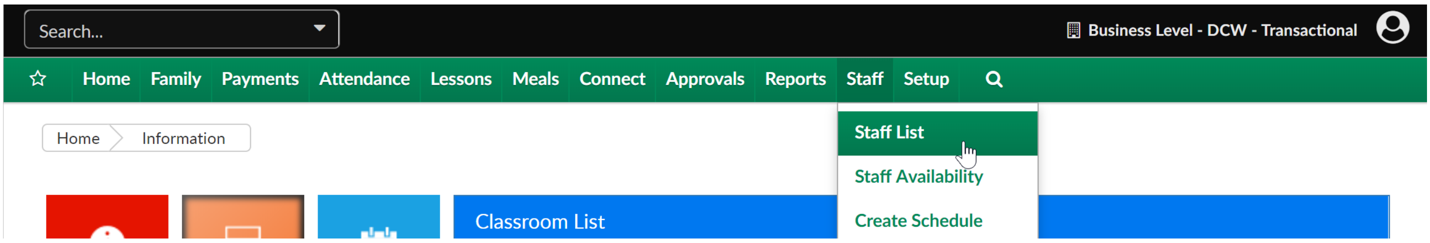
* Confirm Password:

The admin user will now be able to login to the system with the updated password.

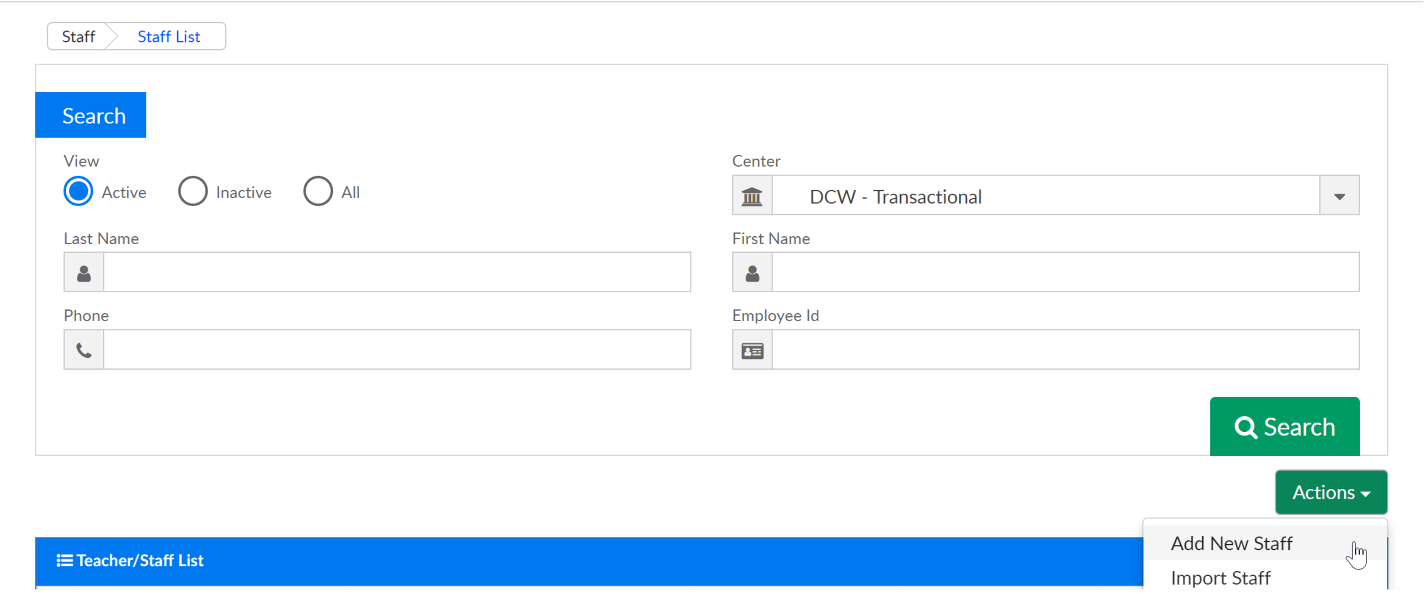
Staff- How do I add a new staff member to the system?

Last Modified on 06/28/2018 3:58 pm EDT

From the Staff menu, select Staff List-



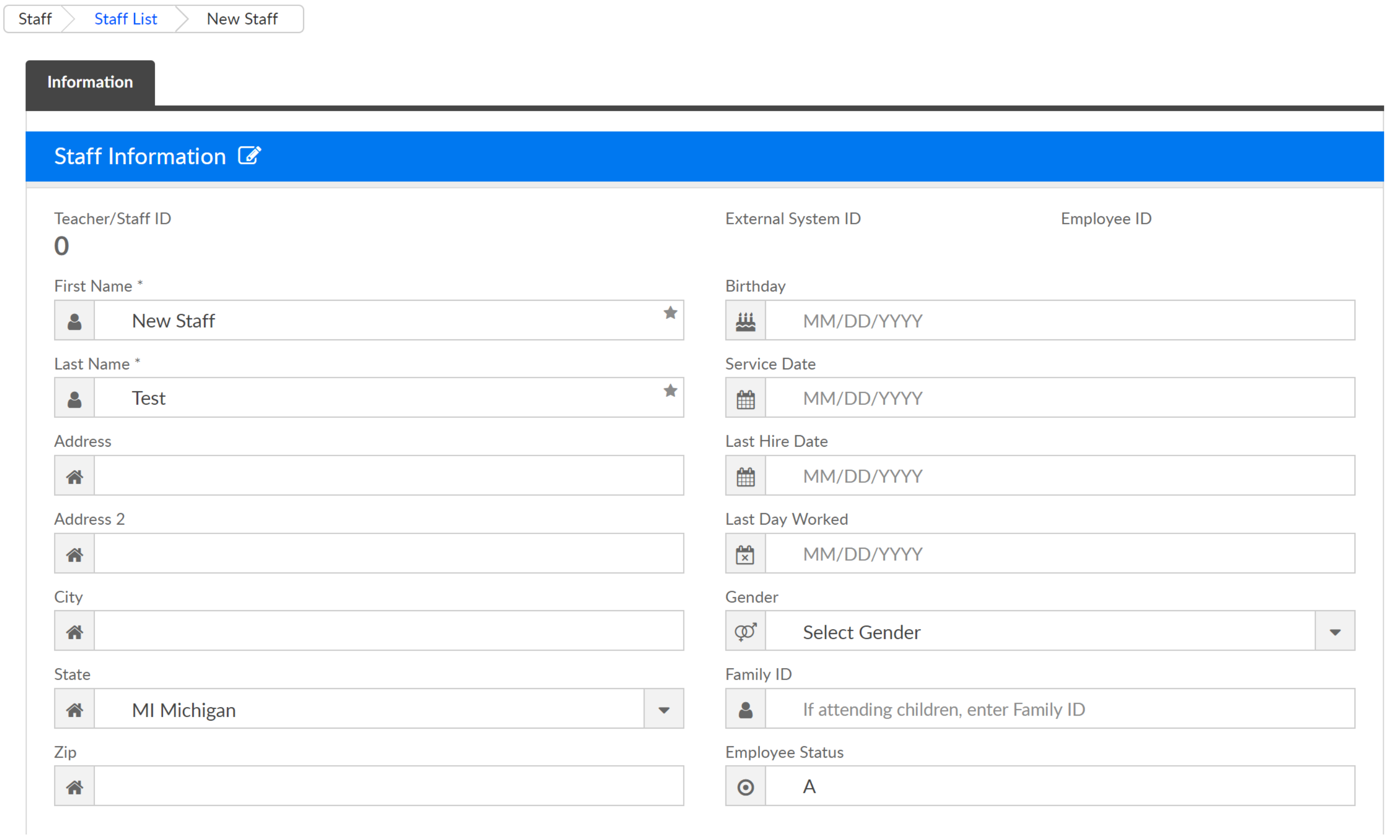
Select the Actions menu, then select Add New Staff-



A new staff record will display, the below information is required. The rest of the detail is optional.

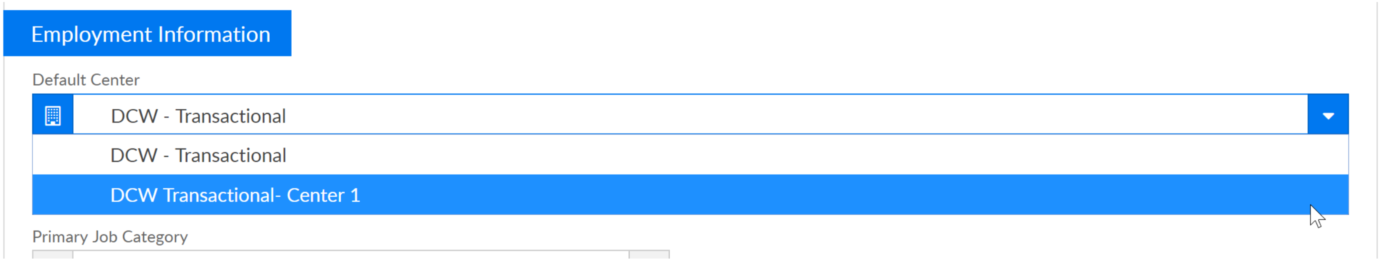
Note: You will want to decide from a business standpoint the extra detail you want to require your staff to enter if they are adding a new staff member. We suggest creating documentation with your specific business requirements to provide to your staff.

In the first section, the required fields are first and last name. To see more detail about the non-required fields, click here .



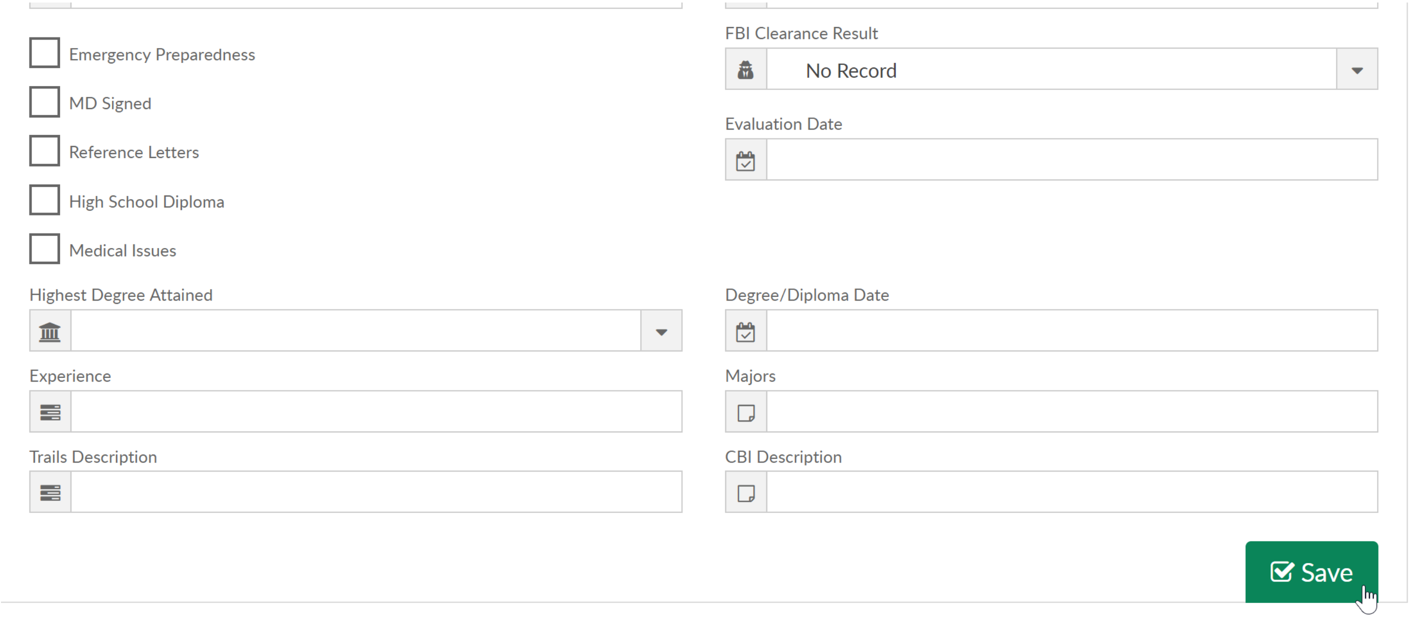
Teacher/Staff ID: 0
External System ID
Employee ID
First Name *: New Staff
Birthday: MM/DD/YYYY
Last Name *: Test
Service Date: MM/DD/YYYY
Address
Last Hire Date: MM/DD/YYYY
Address 2
Last Day Worked: MM/DD/YYYY
City
Gender: Select Gender
State: MI Michigan
Family ID: If attending children, enter Family ID
Zip
Employee Status: A

Select the staff member's default center-



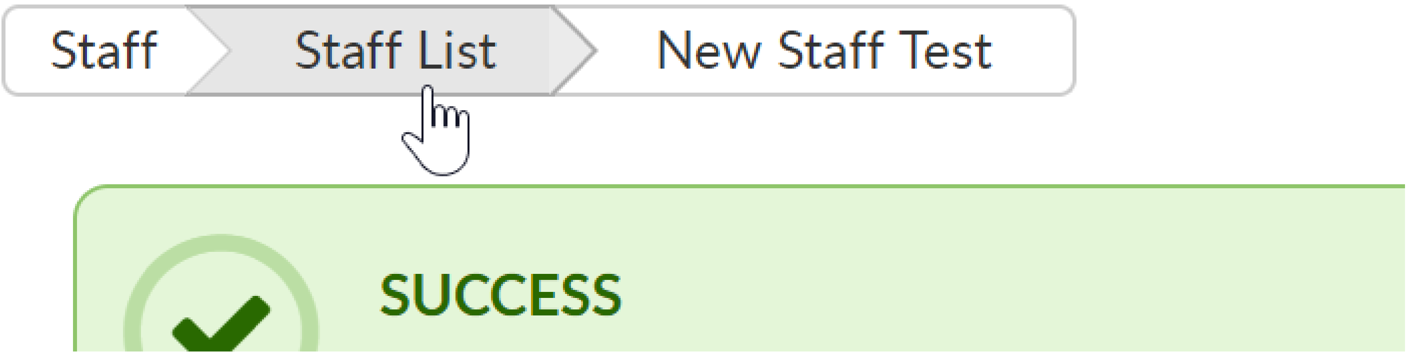
Default Center: DCW - Transactional
DCW - Transactional
DCW Transactional- Center 1
Primary Job Category

Then scroll to the bottom of the page and Save-

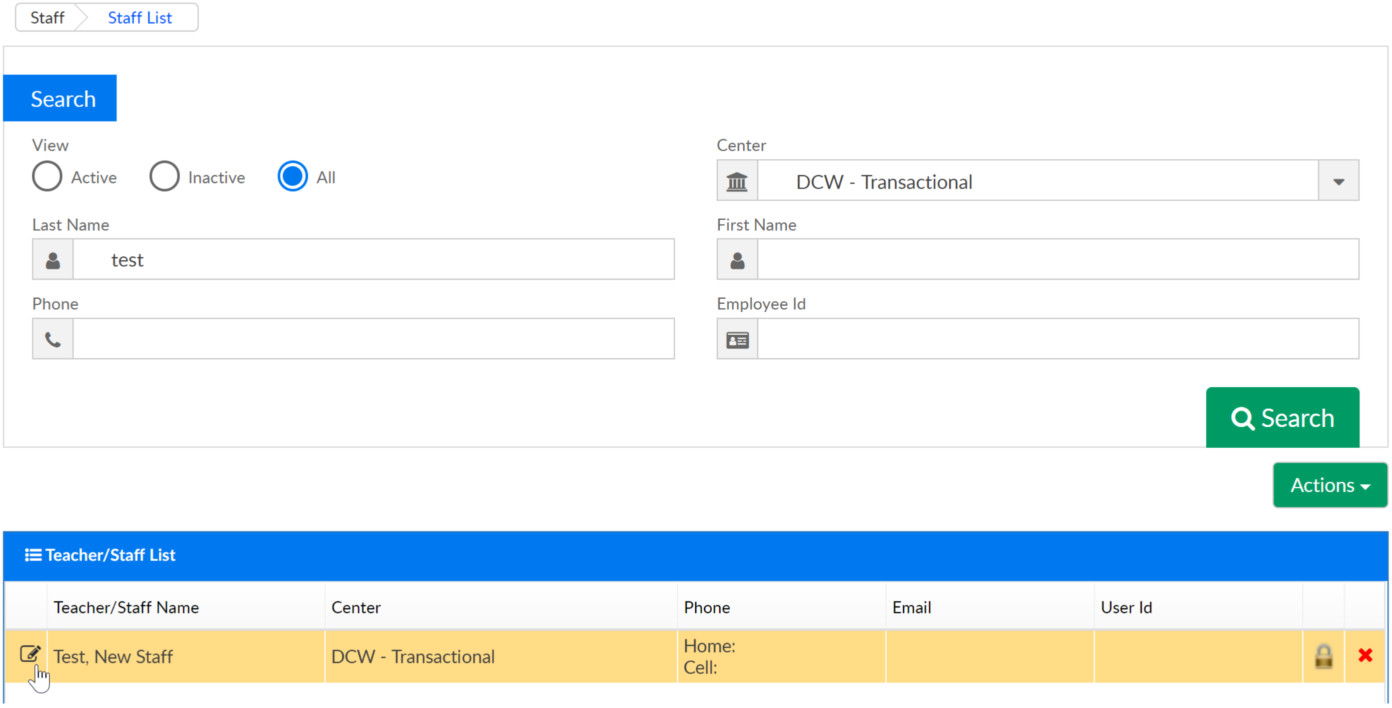


☐ Emergency Preparedness
☐ MD Signed
☐ Reference Letters
☐ High School Diploma
☐ Medical Issues
FBI Clearance Result: No Record
Evaluation Date
Highest Degree Attained
Degree/Diploma Date
Experience
Majors
Trails Description
CBI Description

To add a User ID and Password so the staff member can access the teacher/staff portal and the Insite Provider app , click back to the Staff List page-



Search for the teacher and press the edit icon to go back into the staff member's profile-



View
○ Active ○ Inactive ● All

Center: DCW - Transactional

Last Name: test

First Name:

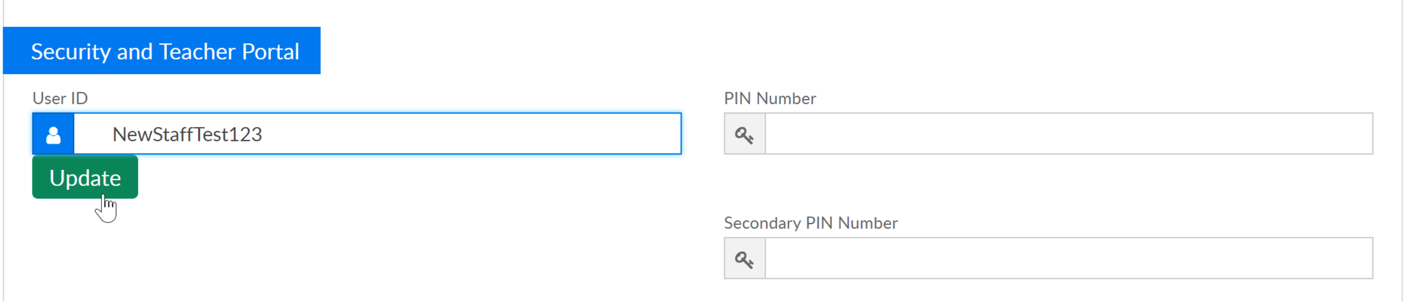
Phone:

Employee Id:

	Teacher/Staff Name	Center	Phone	Email	User Id		
	Test, New Staff	DCW - Transactional	Home: Cell:				✖

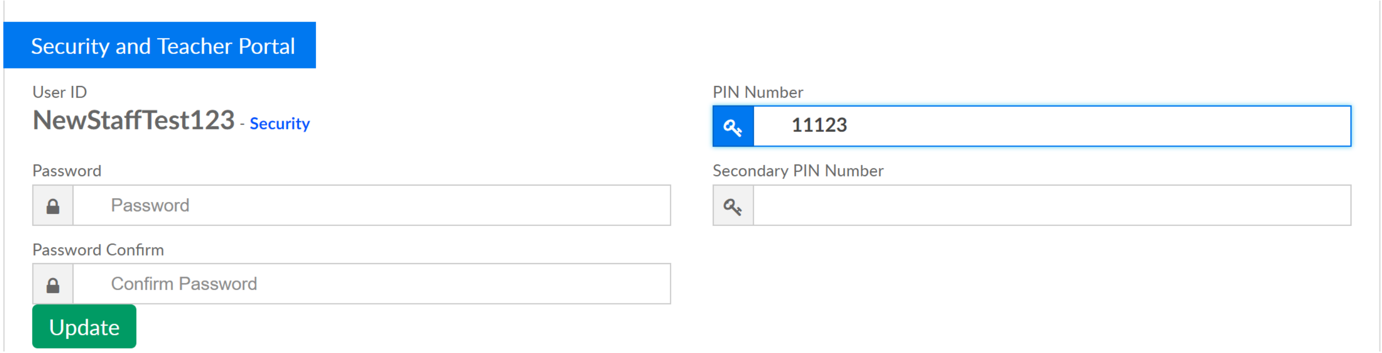
Scroll to the Teacher/Security portal section and enter a username for the teacher, then press update. By default, the password will be the same as the user ID. The staff member can update their password the first time they login to the portal.

Note: Once a username has been entered for a staff member it cannot be updated/changed. If a username must be changed a new staff record must be entered into the system.



User ID: NewStaffTest123

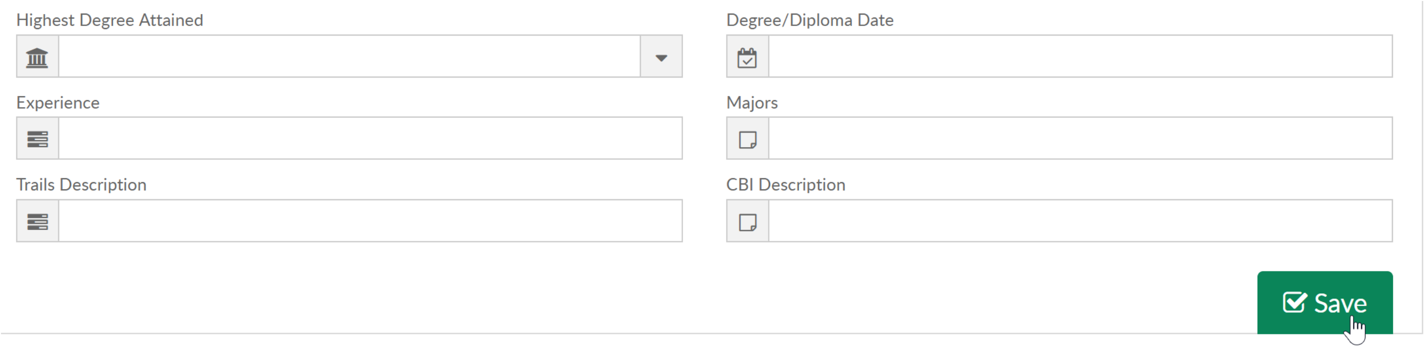
If you want the staff member to be able to clock themselves in on the InSite Select application, enter a PIN number then scroll to the bottom of the page and save. PIN numbers should be between **4-6 digits** and *must be unique.*



User ID: NewStaffTest123

PIN Number: 11123

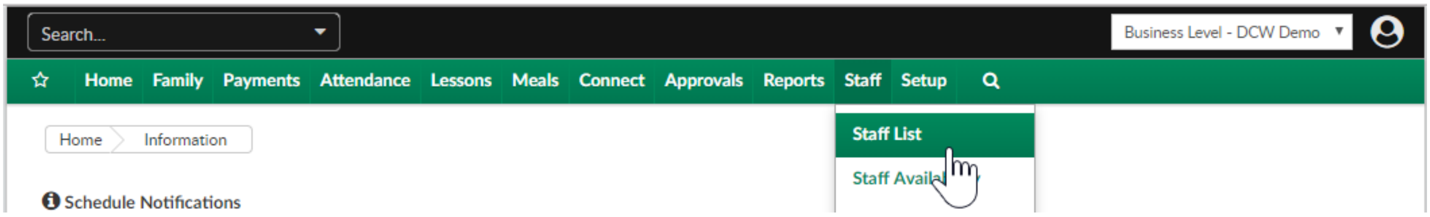
Then press Save.



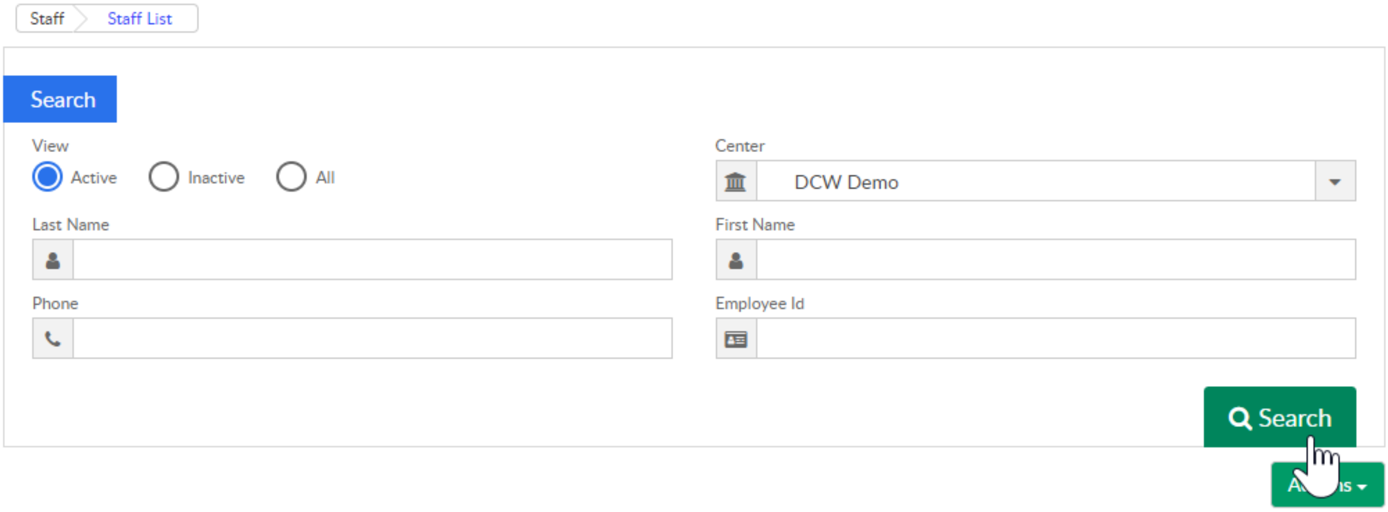
Staff- How do I update a staff member's PIN number?

Last Modified on 06/22/2018 11:22 am EDT

To update a staff member's pin number go to the staff profile by selecting the Staff option from the main menu, then select Staff List.



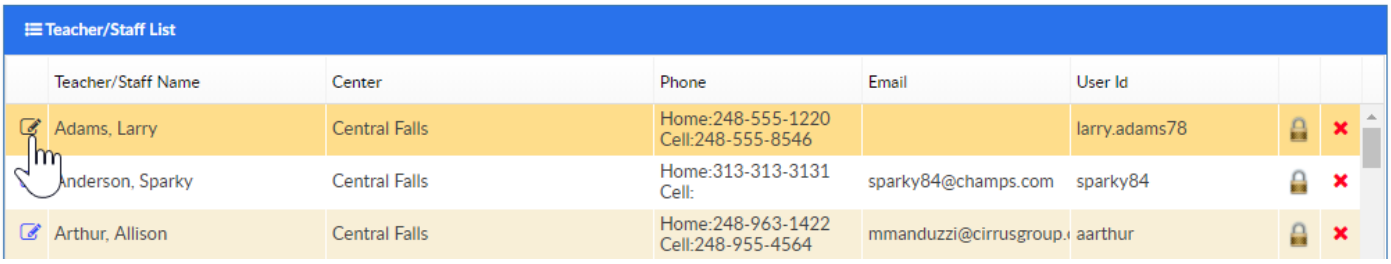
Search for the staff once on the screen.



View: ● Active ○ Inactive ○ All

Center: DCW Demo

Select the edit icon next to the staff member's name to edit their record.

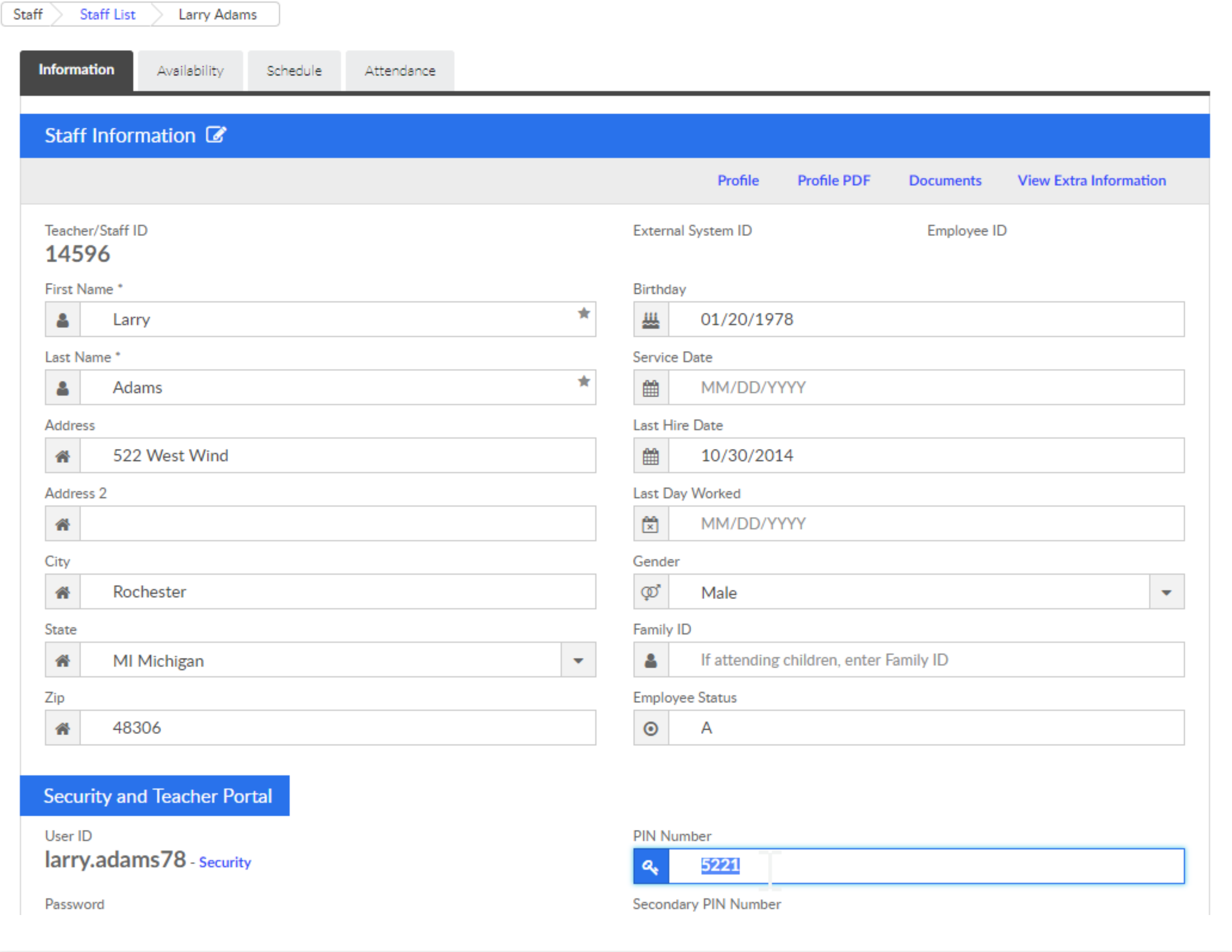


Teacher/Staff List

	Teacher/Staff Name	Center	Phone	Email	User Id		
	Adams, Larry	Central Falls	Home:248-555-1220 Cell:248-555-8546		larry.adams78		✖
	Anderson, Sparky	Central Falls	Home:313-313-3131 Cell:	sparky84@champs.com	sparky84		✖
	Arthur, Allison	Central Falls	Home:248-963-1422 Cell:248-955-4564	mmanduzzi@cirrusgroup.c	aarthur		✖

Scroll to the PIN Number field and enter the new PIN. Once you have entered the new pin, scroll to the bottom of the screen and save.

Note: the PIN number must be unique, the PIN number can only be updated from this screen by an admin user with the correct access.



Staff Information

Teacher/Staff ID
14596

External System ID

Employee ID

First Name *	Larry
Last Name *	Adams
Address	522 West Wind
Address 2	
City	Rochester
State	MI Michigan
Zip	48306
Birthday	01/20/1978
Service Date	MM/DD/YYYY
Last Hire Date	10/30/2014
Last Day Worked	MM/DD/YYYY
Gender	Male
Family ID	If attending children, enter Family ID
Employee Status	A

Security and Teacher Portal

User ID
larry.adams78 - Security

PIN Number
5221

Password

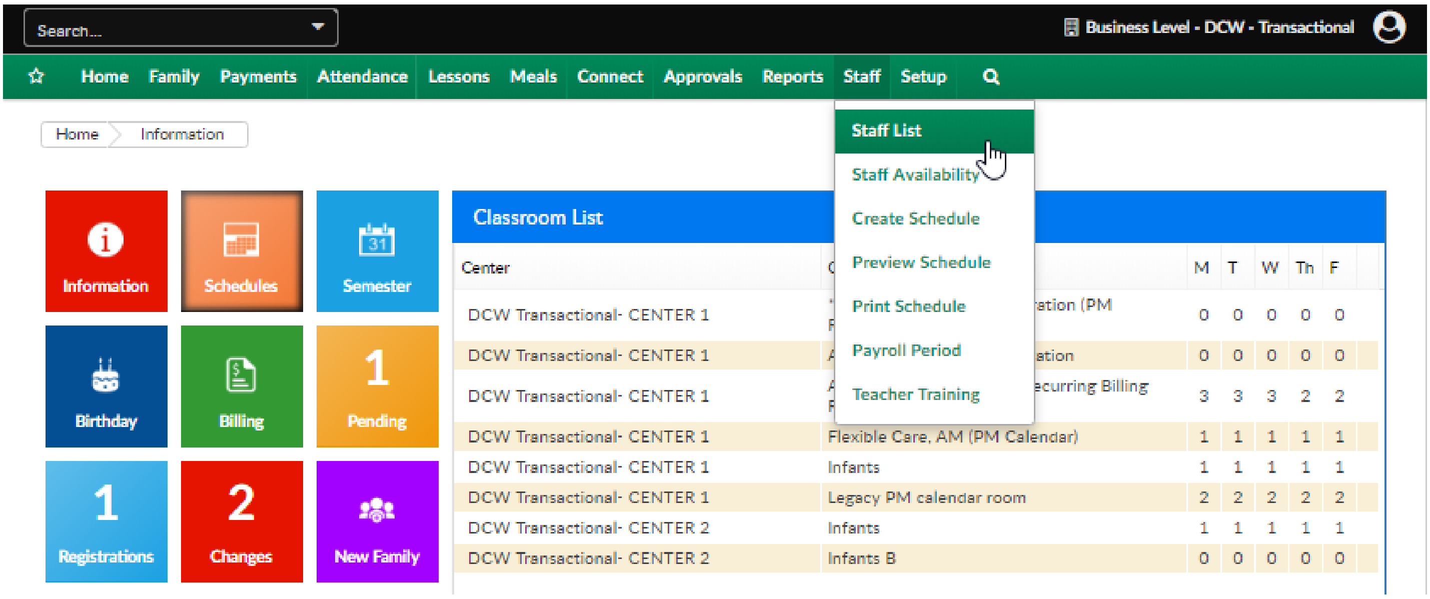
Secondary PIN Number

Staff- How do I add documents to staff records?

Last Modified on 01/04/2019 12:51 pm EST

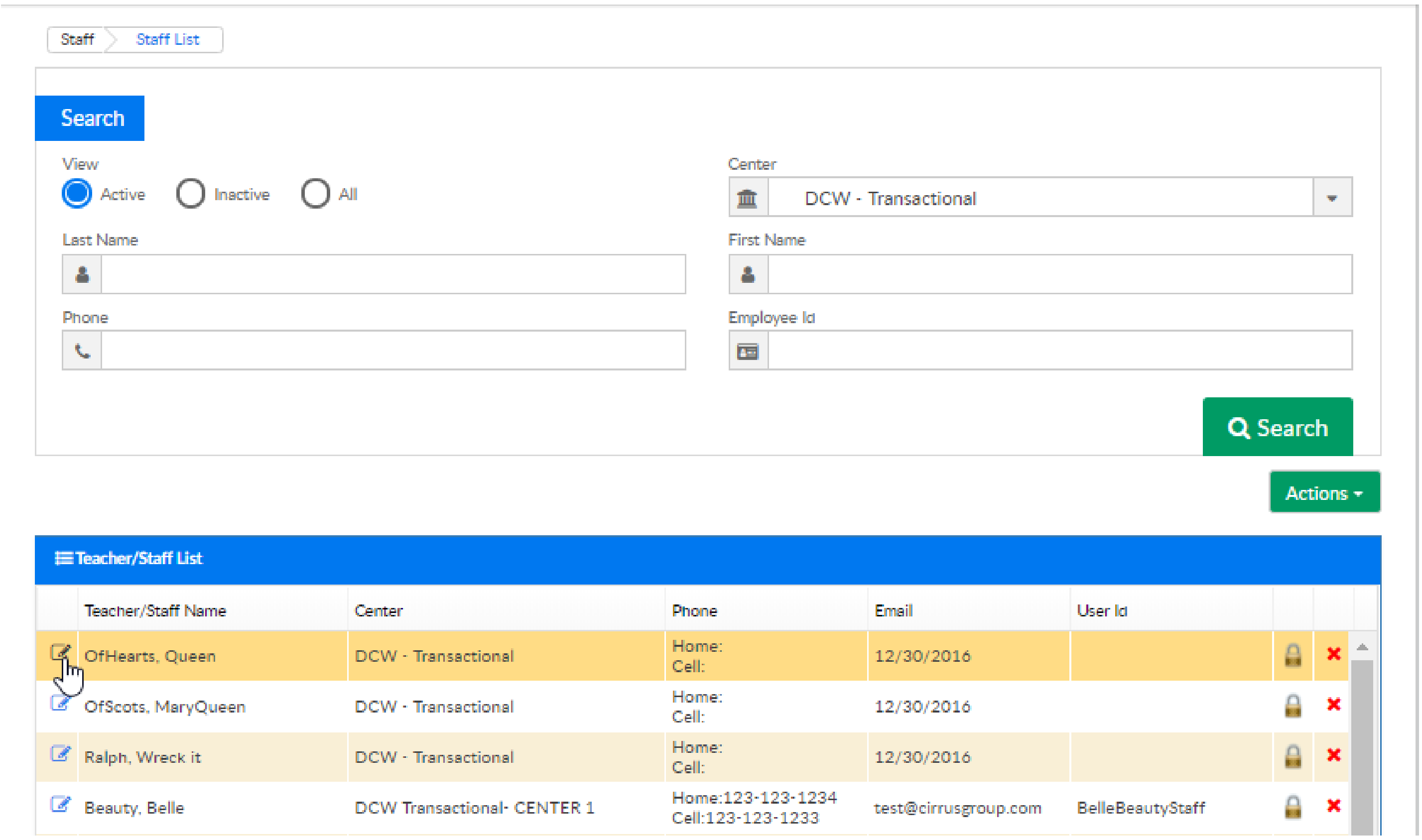
How to view, add or delete documents to teacher records.

From the Staff option on the main menu, select Staff List



Center	C	M	T	W	Th	F
DCW Transactional- CENTER 1	ation (PM	0	0	0	0	0
DCW Transactional- CENTER 1	ation	0	0	0	0	0
DCW Transactional- CENTER 1	ecurring Billing	3	3	3	2	2
DCW Transactional- CENTER 1	Flexible Care, AM (PM Calendar)	1	1	1	1	1
DCW Transactional- CENTER 1	Infants	1	1	1	1	1
DCW Transactional- CENTER 1	Legacy PM calendar room	2	2	2	2	2
DCW Transactional- CENTER 2	Infants	1	1	1	1	1
DCW Transactional- CENTER 2	Infants B	0	0	0	0	0

On the Staff List screen use the search criteria section to populate a list of staff within the system. Select the edit icon next to the staff member's name to open the staff's record-


Staff > Staff List

Search

View
● Active ○ Inactive ○ All

Center: DCW - Transactional

Last Name:

First Name:

Phone:

Employee Id:

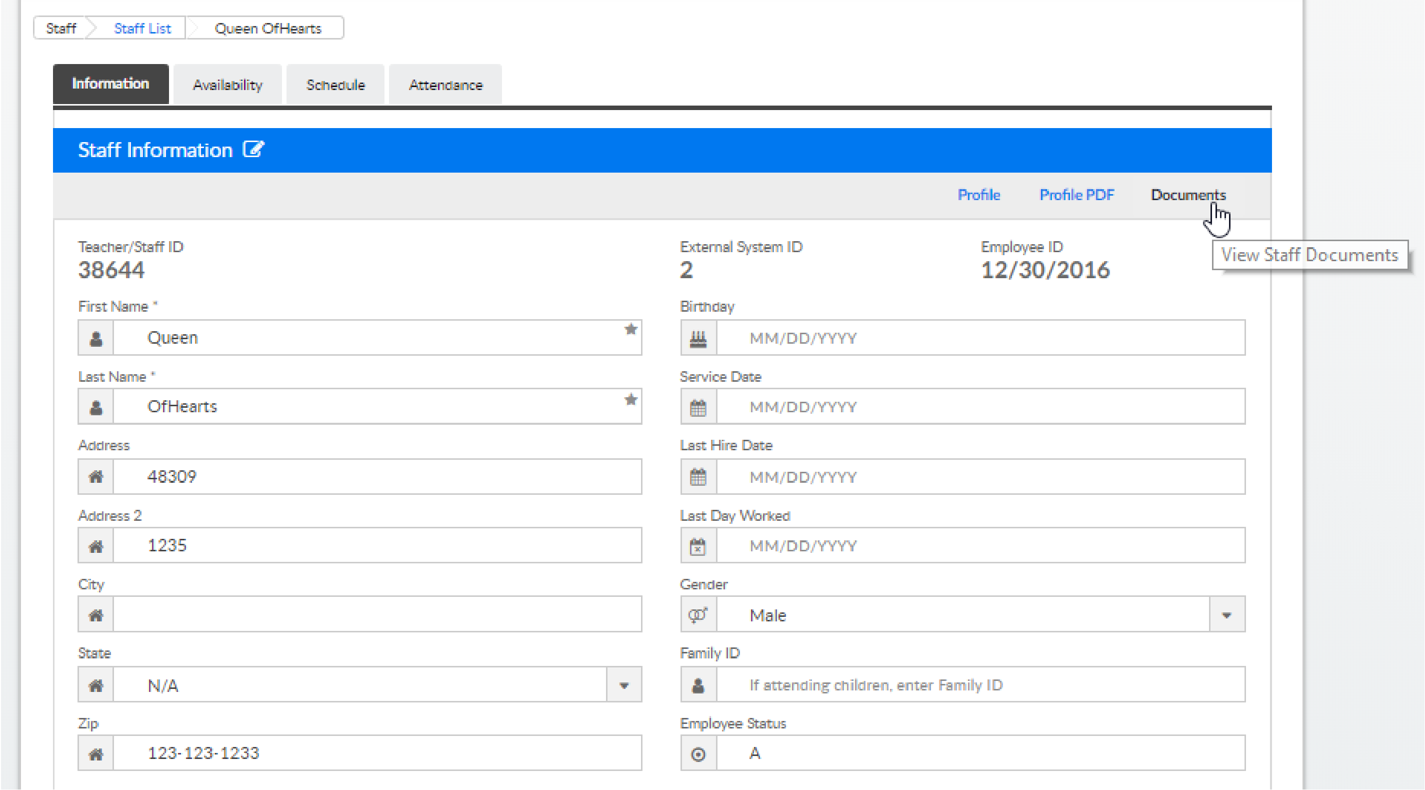
Search

Actions

Teacher/Staff List

Teacher/Staff Name	Center	Phone	Email	User Id
OfHearts, Queen	DCW - Transactional	Home: Cell:	12/30/2016	
OfScots, MaryQueen	DCW - Transactional	Home: Cell:	12/30/2016	
Ralph, Wreck it	DCW - Transactional	Home: Cell:	12/30/2016	
Beauty, Belle	DCW Transactional- CENTER 1	Home:123-123-1234 Cell:123-123-1233	test@cirrusgroup.com	BelleBeautyStaff

Select the Documents link on the screen


Staff > Staff List > Queen OfHearts

Information | Availability | Schedule | Attendance

Staff Information

Profile | Profile PDF | Documents

View Staff Documents

Teacher/Staff ID: 38644

External System ID: 2

Employee ID: 12/30/2016

First Name *: Queen

Birthday: MM/DD/YYYY

Last Name *: OfHearts

Service Date: MM/DD/YYYY

Address: 48309

Last Hire Date: MM/DD/YYYY

Address 2: 1235

Last Day Worked: MM/DD/YYYY

City:

Gender: Male

State: N/A

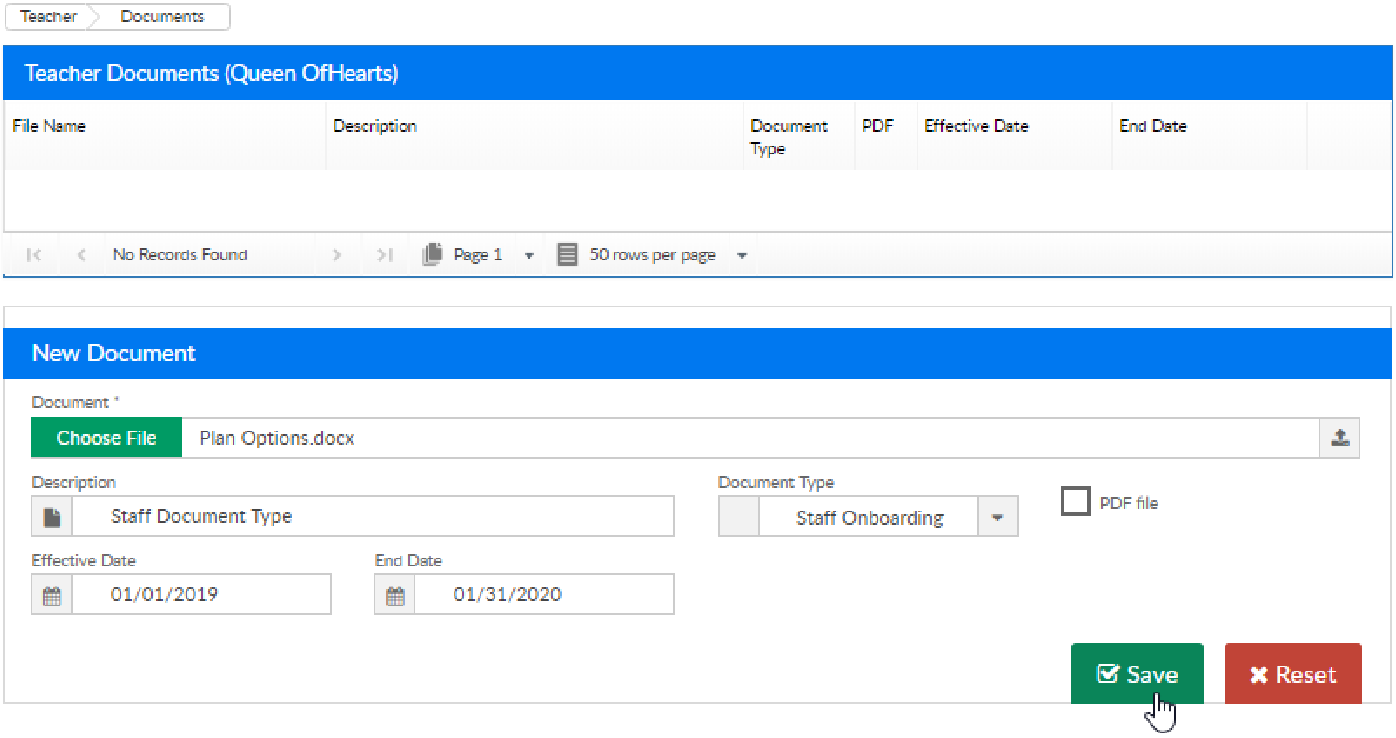
Family ID: If attending children, enter Family ID

Zip: 123-123-1233

Employee Status: A

On the Documents screen any existing documents will display in the top portion of the page under the Teacher Documents section.

To add a new document, click into the Choose File field and select the file from your computer. Add a description for the document that will display in the system, choose a document type (document types can be setup under the setup > system config > valid values , value type- Document Type- Center), check the PDF file box if the document is a PDF, then add effective date and end date.



Teacher Documents (Queen OfHearts)

File Name	Description	Document Type	PDF	Effective Date	End Date

New Document

Document *: Plan Options.docx

Description: Staff Document Type

Document Type: Staff Onboarding

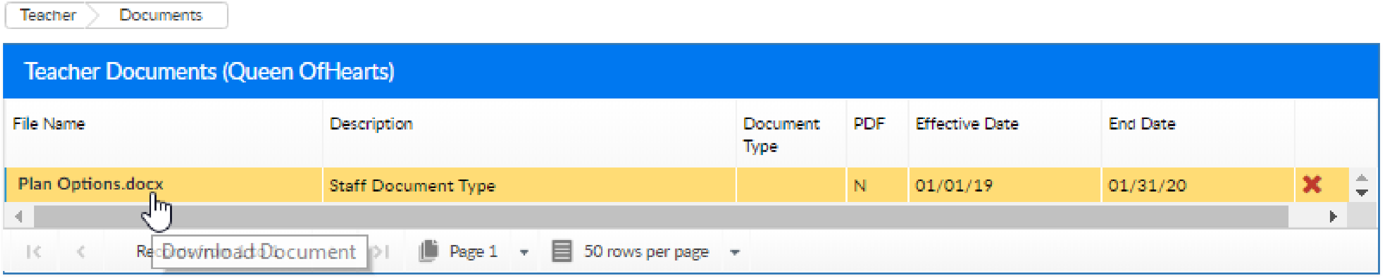
☐ PDF file

Effective Date: 01/01/2019

End Date: 01/31/2020

After selecting the Save button, the screen will refresh and the document will display in the Teacher Documents section.

- Click on the file nave to download the document
- Click on the red x to delete the document



Teacher Documents (Queen OfHearts)

File Name	Description	Document Type	PDF	Effective Date	End Date	
Plan Options.docx	Staff Document Type		N	01/01/19	01/31/20	✖

There is not currently a limit to the number of documents that can be added to a staff's record. Once documents have been added in the system, they can not be edited (only deleted).

Texting Integration Information

Last Modified on 03/20/2018 8:03 am EDT

Texting with parents is in conjunction with a third party, below is a bit of information on the two vendors we support.

Fees for SMS start at around $0.006 per message sent and depend on if they need a dedicated SMS shortcode or not. These fees are from the SMS service vendors themselves, not Cirrus Group, and requires you to sign up for the services directly.

Cirrus Group does not charge for SMS messaging integration or per message fees through our platform for current clients.

The two supported SMS vendors are Nexmo.com – Good if you don't need a dedicated short code and Twilio.com – Good if you want a dedicated short code.

Once you select a vendor and sign up you will need to provide us with:

- API Key
- API Secret
- Short Code (if applicable)
- Phone Number
- If you want to send the texts from short code or from a phone number

One Call Now Integration

Last Modified on 05/31/2018 12:11 pm EDT

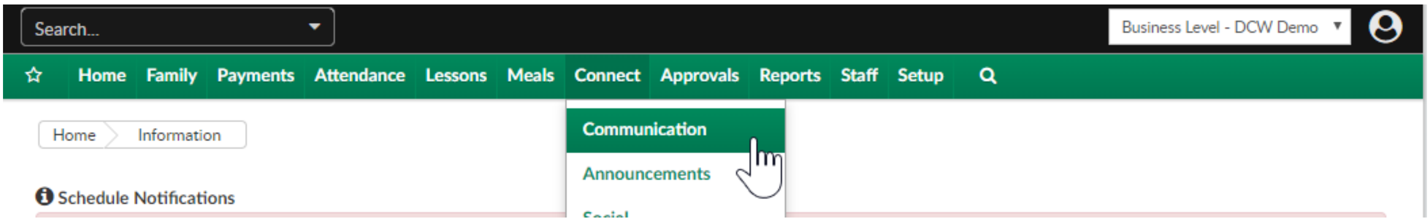
OneCallNow is an extra service within the Platform at allows centers the ability to send out mass phone calls to parents in the center. This service replaces the traditional method of calling parents one by one or using a telephone tree. Phone calls are entered as a text message into OneCallNow and then the parents are called through the server with the message, quickly informing parents of the information

Sign up for OneCallNow!- click here

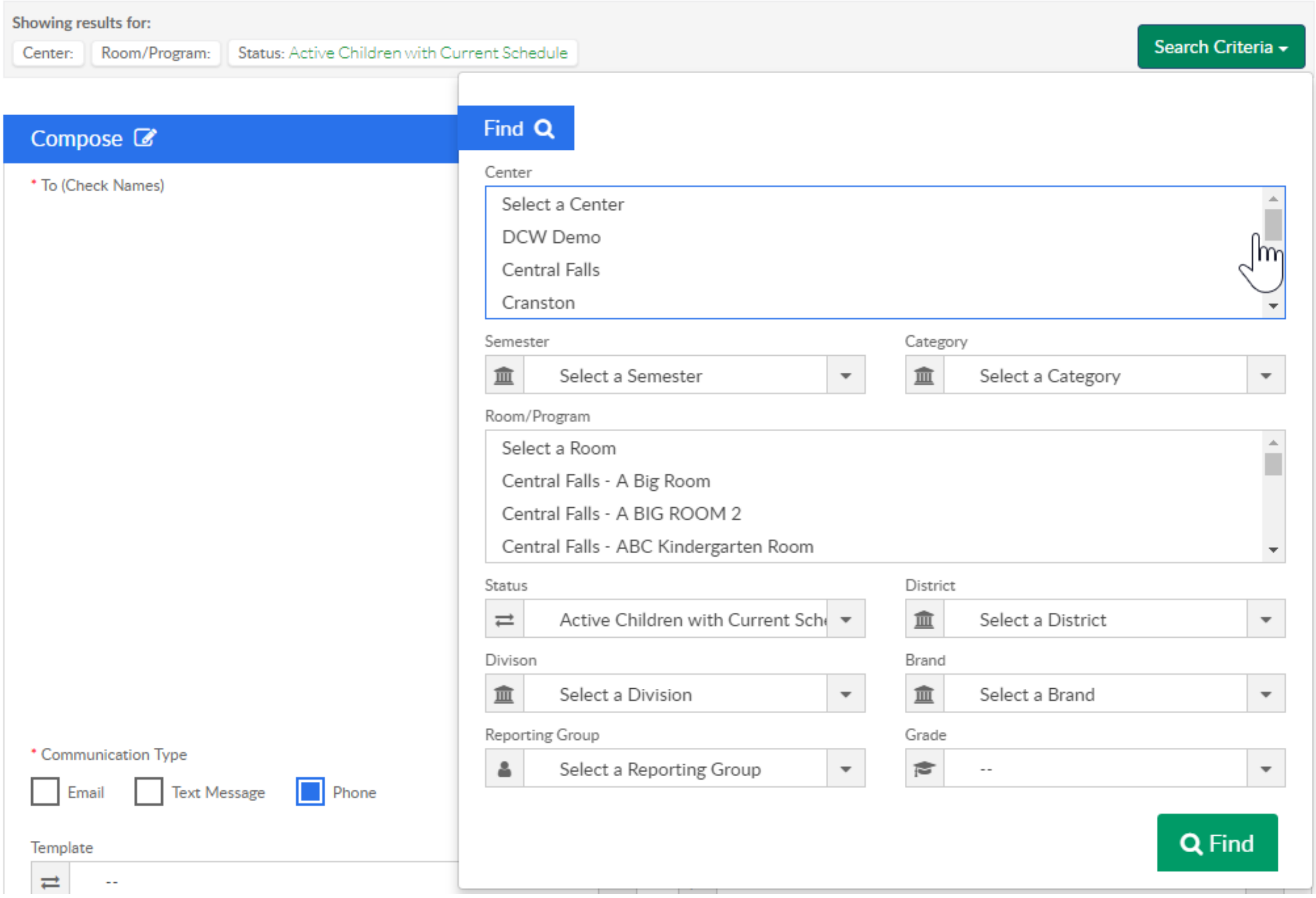
Once you sign up for an account, please send us the Group Key, PIN and Login Token.

OneCallNow Example-

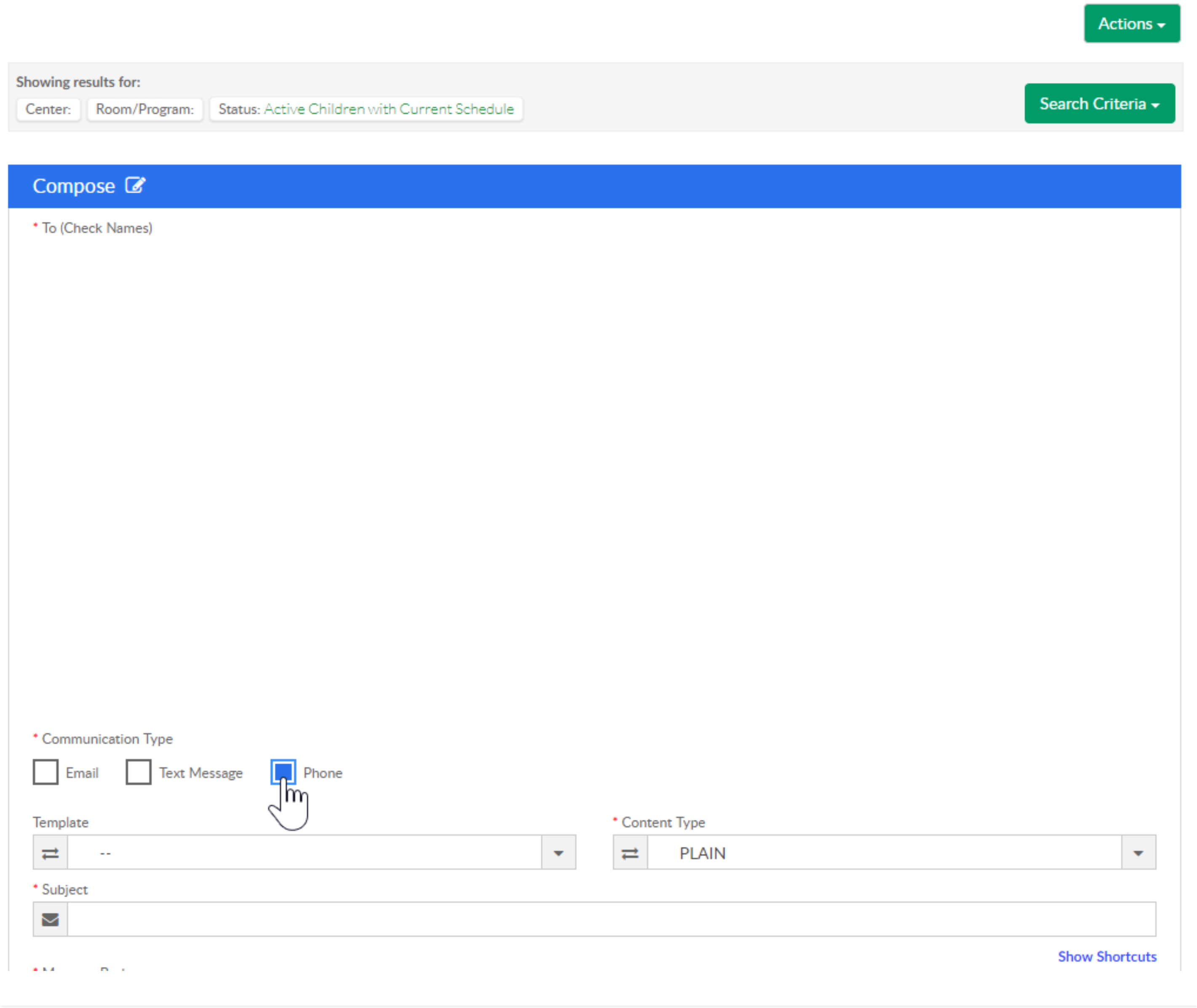
From the Connect menu, select Communications-



Select Search Criteria to find families that match AND have phone numbers by selecting the Serach Criteria button.



Then Select Phone as the communication type. Enter the subject and body of the call - then press send.



Showing results for:

Center: | Room/Program: | Status: Active Children with Current Schedule

* To (Check Names)

* Communication Type

☐ Email ☐ Text Message ☑ Phone

Template: --

* Content Type: PLAIN

* Subject

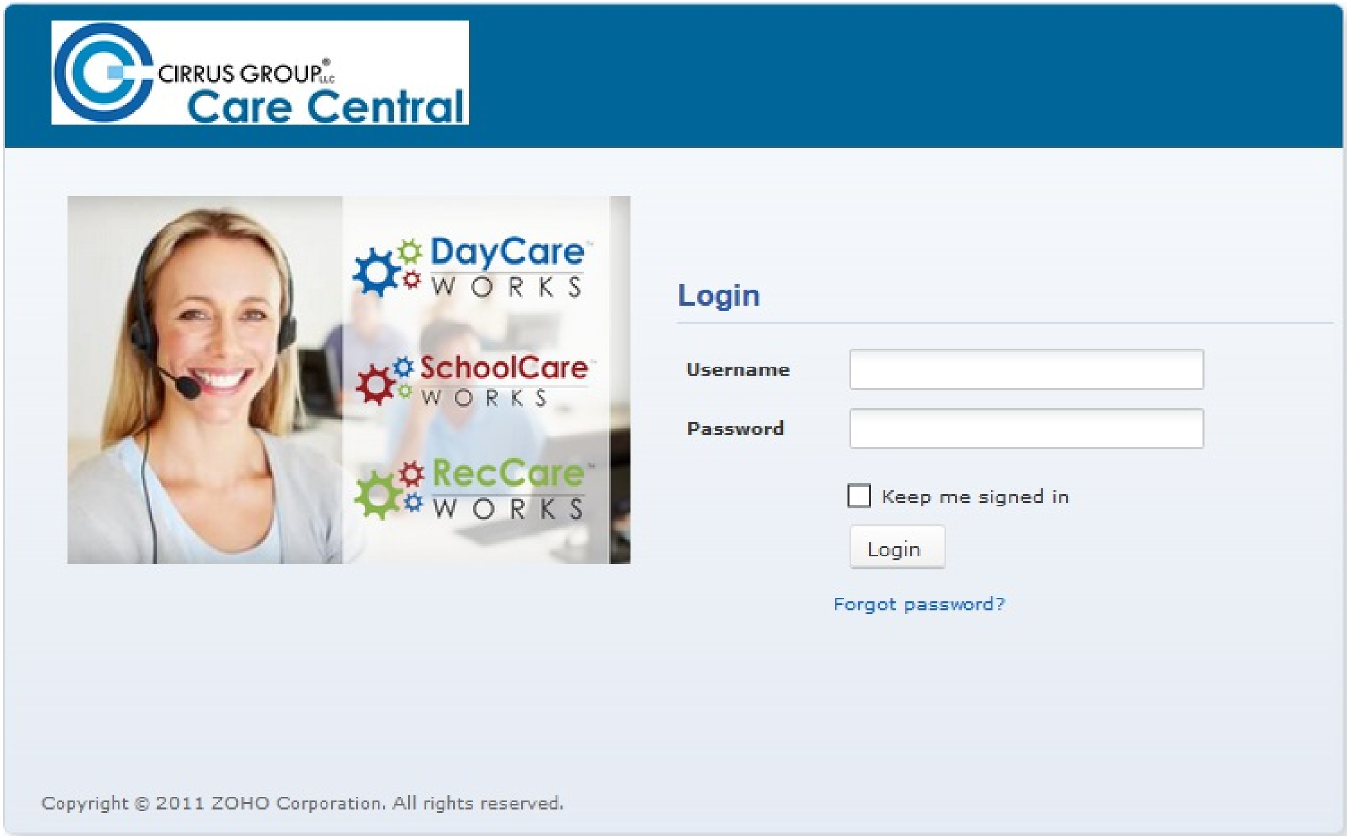
Care Portal Guide

Last Modified on 05/10/2018 11:31 am EDT

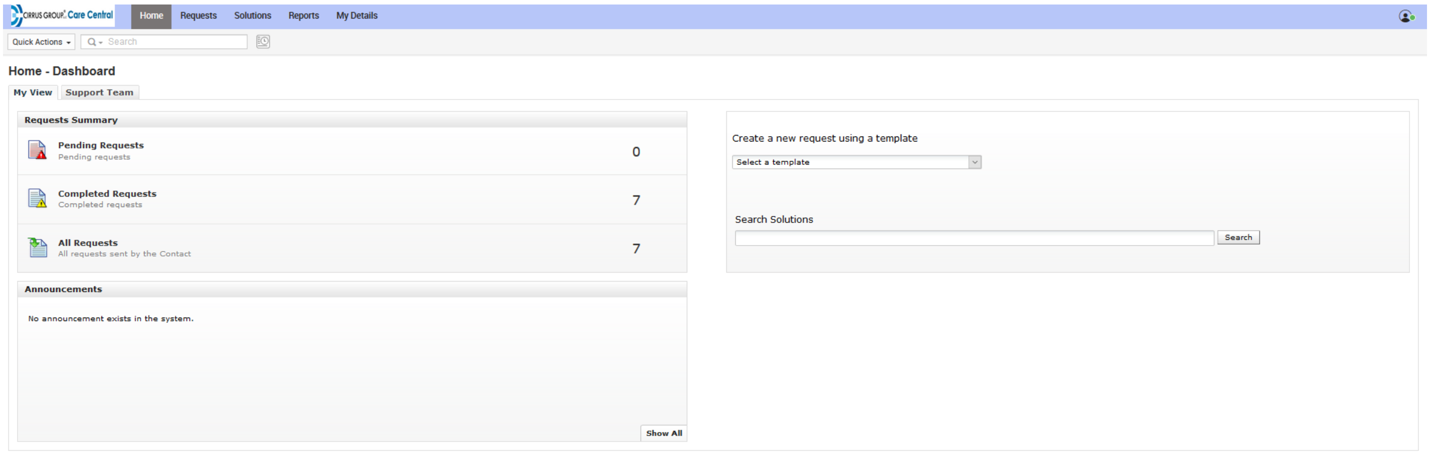
The Care portal is where issues, feature requests and enhancements are reported.

When onboarding occurs each admin level user should receive a username and password in order to access the Care portal.

The Care portal is located at https://care.cirrusgroup.com/. To login, enter your Care portal username and password (this may be different than the username and password you use to login to SchoolCareWorks.com or DayCareWorks.com) then press Login.

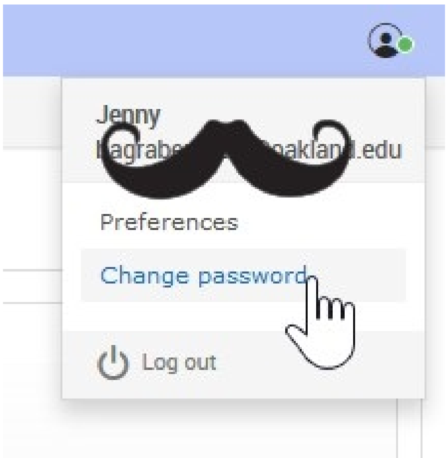


The home page will display a summary of requests that you have submitted to the portal, any announcements, the ability to search solutions that have been added by Cirrus Group, the ability to run reports and view user details.



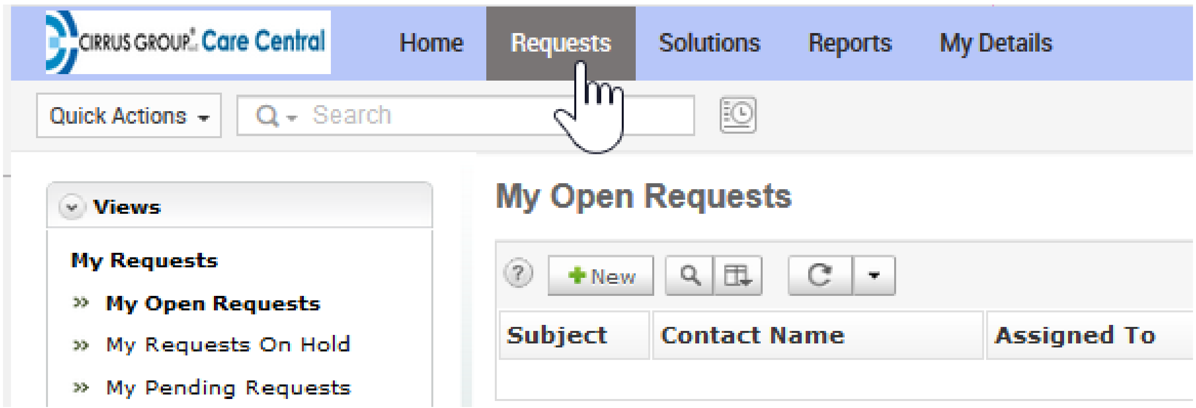
No announcement exists in the system.

The first time you login, you will want to update your password by selecting the user icon in the top right corner of the screen. Then select Change Password-

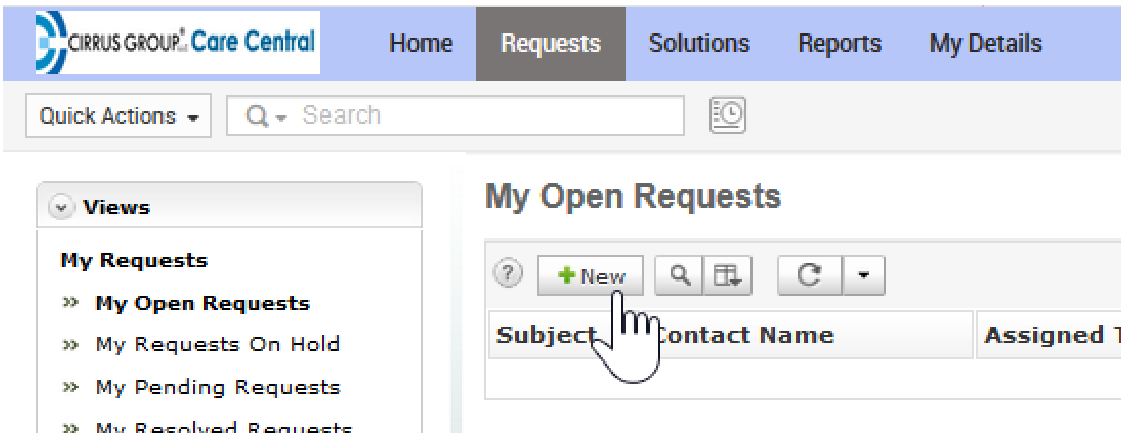


Enter your current password, then enter your new password, confirm the password and save.

To add a new ticket to the system select the requests option at the top of the page.

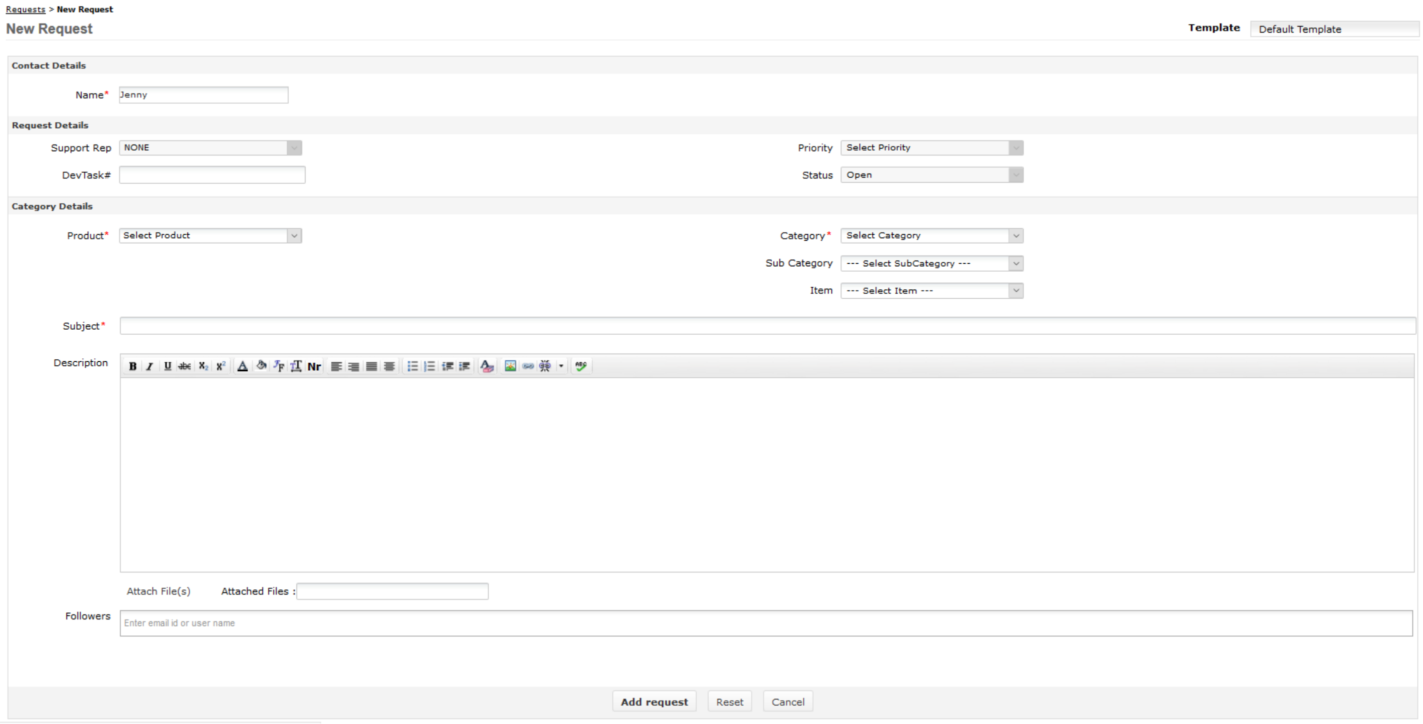


Then select the +New button.



Enter required fields (marked with an *) then press the Add Request button.

- Name (will default to your name since you are logged in)
- Product- select the item your request relates to
- Category- select the category of your request
- Subject- summary of your request
- Description- detail of your request
- Attach Files by clicking on the Attach File(s) link
- Followers- start typing other users in the system in the followers section to tag other users


Requests > New Request

New Request

Template: Default Template

Contact Details

Name*: Jenny

Request Details

Support Rep: NONE

DevTask#:

Priority: Select Priority

Status: Open

Category Details

Product*: Select Product

Category*: Select Category

Sub Category: --- Select SubCategory ---

Item: --- Select Item ---

Subject*:

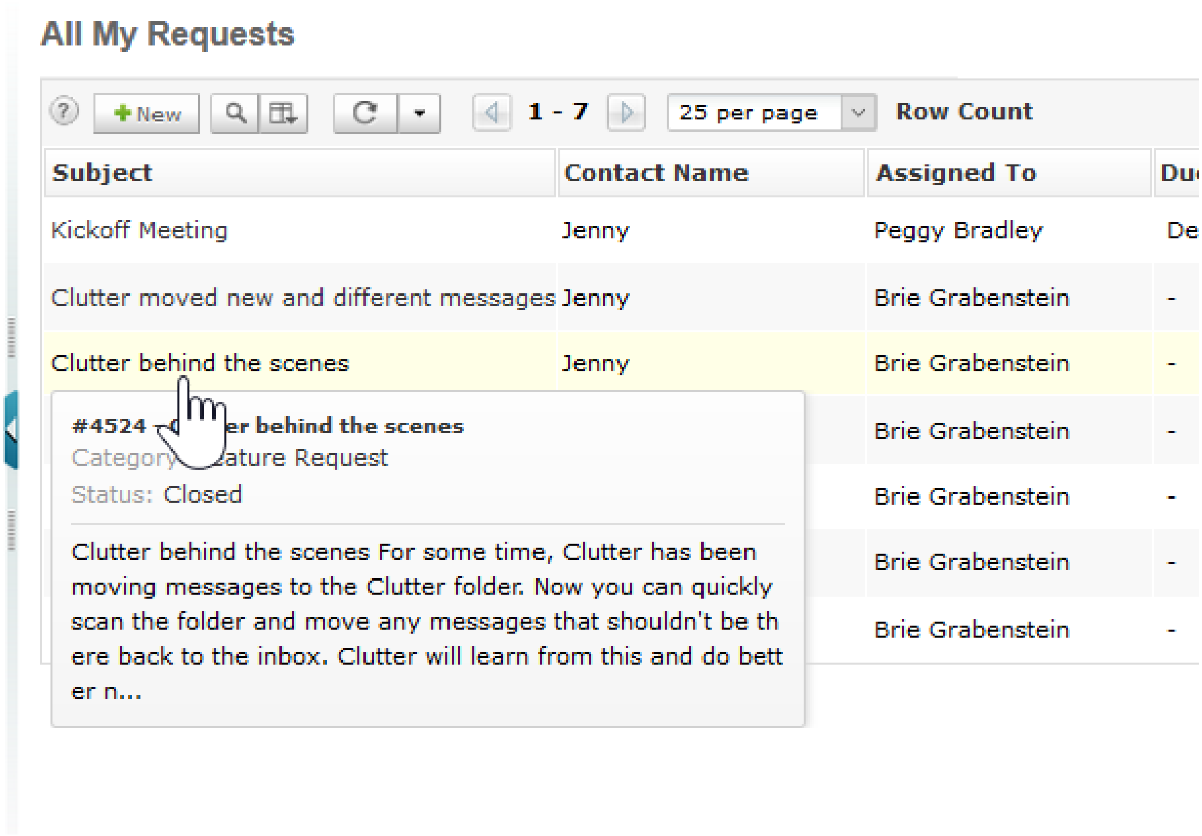
Description:

Attach File(s)

Attached Files :

Followers: Enter email id or user name

To check on the status of your request select a view from the Views box in the left column, then click on the request you want to follow up on.



All My Requests

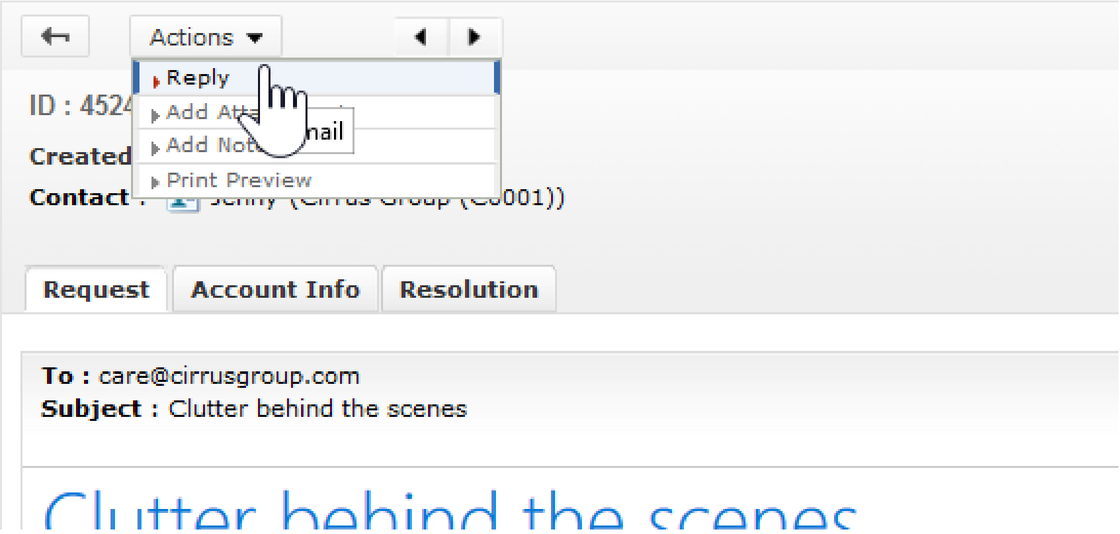
Subject	Contact Name	Assigned To	Du
Kickoff Meeting	Jenny	Peggy Bradley	De
Clutter moved new and different messages	Jenny	Brie Grabenstein	-
Clutter behind the scenes	Jenny	Brie Grabenstein	-
		Brie Grabenstein	-
		Brie Grabenstein	-
		Brie Grabenstein	-
		Brie Grabenstein	-

#4524 - C er behind the scenes
Category ature Request
Status: Closed

Clutter behind the scenes For some time, Clutter has been moving messages to the Clutter folder. Now you can quickly scan the folder and move any messages that shouldn't be th ere back to the inbox. Clutter will learn from this and do bett er n...

To send a request for an update or additional information select the Actions button.

- Reply- send a message to the assigned support representative
- Add Attachment- add a document or image to the request
- Add Note- add message for rep
- Print Preview- print request detail



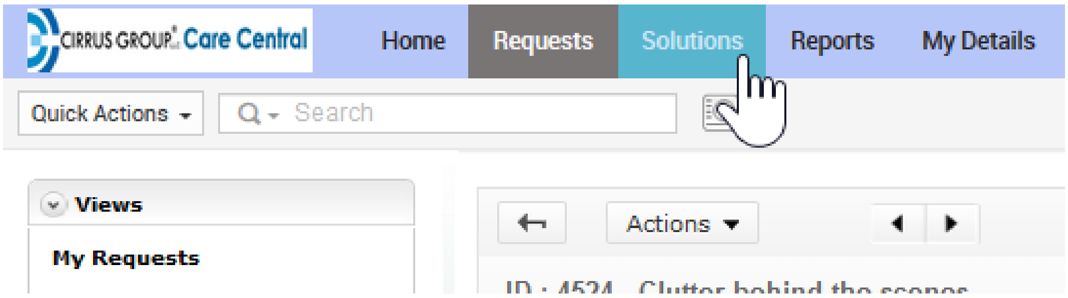
ID : 452
Created
Contact : Jenny (Cirrus Group (C0001))

To : care@cirrusgroup.com
Subject : Clutter behind the scenes

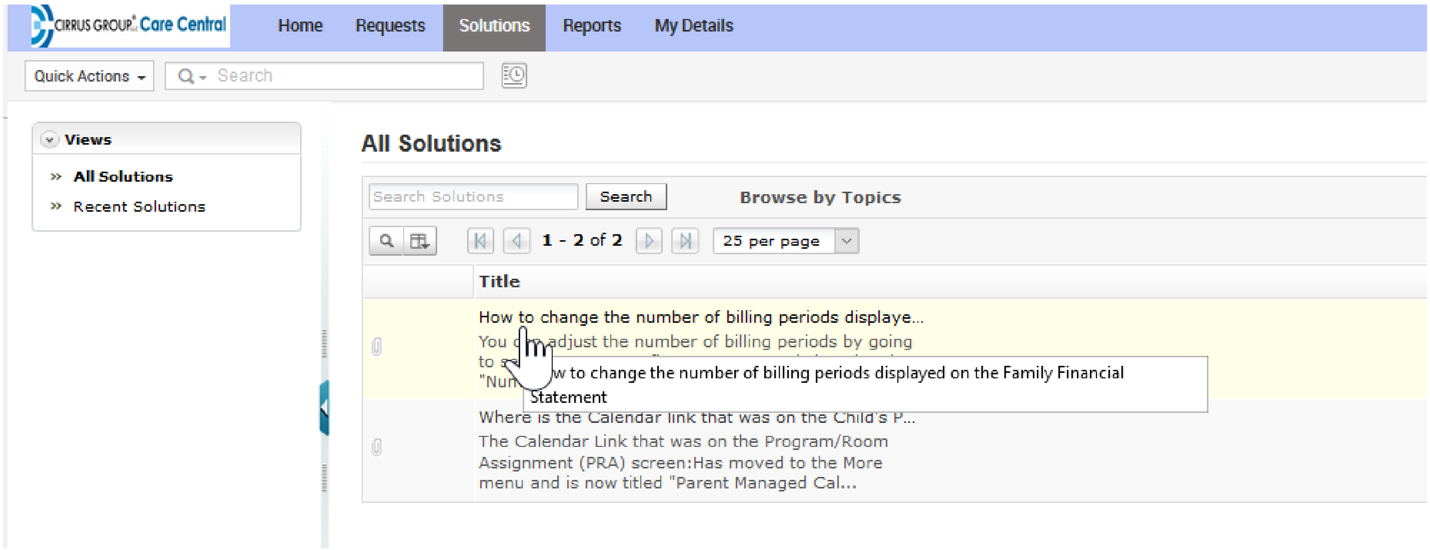
Clutter behind the scenes

Click on the resolution tab to view detail as to how the issue was or will be resolved. A resolution will only be added if the request has been resolved or closed.

Click on the Solutions option to see how commonly asked items have been resolved.



Select the text to learn more about the solution-



All Solutions

Title
How to change the number of billing periods displaye... You c adjust the number of billing periods by going to s "Nun
Where is the Calendar link that was on the Child's P... The Calendar Link that was on the Program/Room Assignment (PRA) screen:Has moved to the More menu and is now titled "Parent Managed Cal...

w to change the number of billing periods displayed on the Family Financial Statement

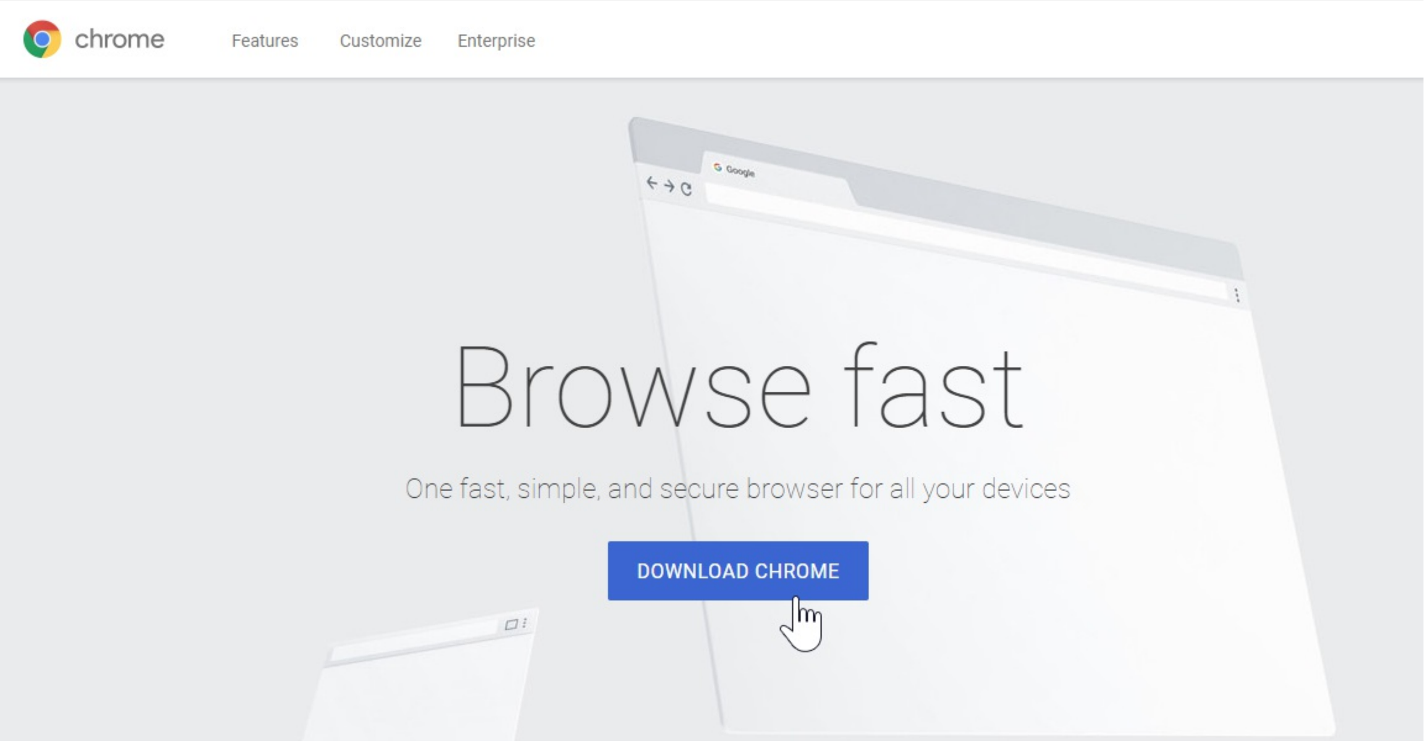
Other Helpful Tools & Resources

Last Modified on 02/09/2018 8:38 am EST

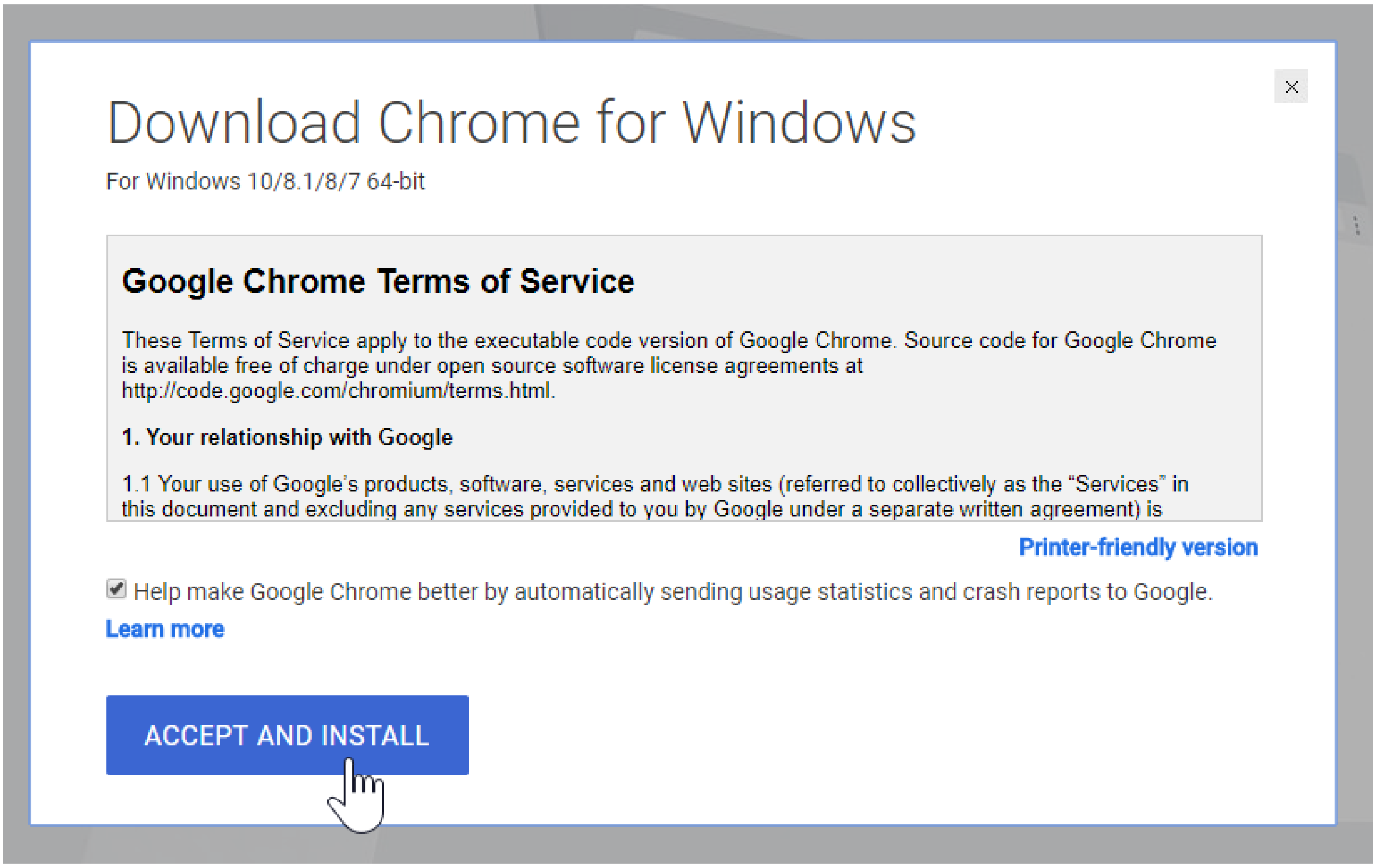
In order to get the most out of our system there are a few tools/resources that will be helpful.

Chrome Browser- Click Here!

Our site works best with Chrome. Click the link above to download! On the Chrome page, click the Download Chrome link.



Click the button to Accept and Install after reading the terms and conditions.



Download Chrome for Windows

For Windows 10/8.1/8/7 64-bit

Google Chrome Terms of Service

These Terms of Service apply to the executable code version of Google Chrome. Source code for Google Chrome is available free of charge under open source software license agreements at http://code.google.com/chromium/terms.html.

1. Your relationship with Google

1.1 Your use of Google's products, software, services and web sites (referred to collectively as the "Services" in this document and excluding any services provided to you by Google under a separate written agreement) is

☑ Help make Google Chrome better by automatically sending usage statistics and crash reports to Google.

Your download should begin, once the download is complete open the ChromeSetup.exe file and follow the prompts.

Grammarly- Click Here!

Grammarly is a an extension for Chrome, it will check your grammar and spelling in text boxes.

Pivot Tables- Click Here!

Pivot tables are a powerful excel tool that will help you sort and analyze data. Click the link above for an overview of how to create pivot tables.

Family Import Sheet

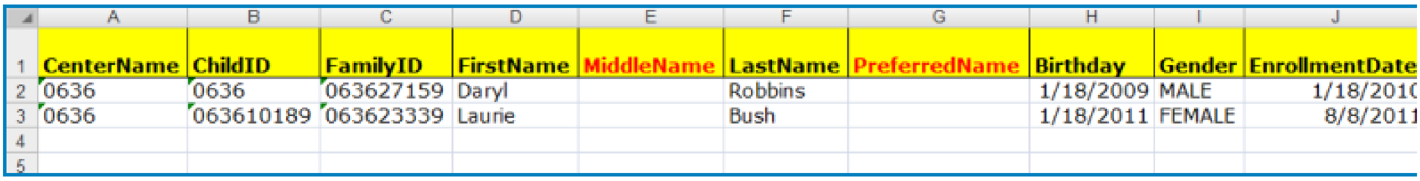
Last Modified on 06/25/2018 8:42 am EDT

Family Import Sheet: The Family Import Sheet is used to import families into the Platform. Importing families into the Platform includes the children, parents, emergency contacts, and balances for both the child and any associations to third party agencies. Required fields are noted in red.

To download this spreadsheet, click on the following link:importtemplate.xls 📎

After completing this spreadsheet, return the files to to your account manager or customer service representative.

Child Tab- This tab is where you would enter each child's detail that should be added to your system. Each child should have their own row. Children need to have a unique child ID and should only display once on your import.



	A	B	C	D	E	F	G	H	I	J
1	CenterName	ChildID	FamilyID	FirstName	MiddleName	LastName	PreferredName	Birthday	Gender	EnrollmentDate
2	0636	0636	063627159	Daryl		Robbins		1/18/2009	MALE	1/18/2010
3	0636	063610189	063623339	Laurie		Bush		1/18/2011	FEMALE	8/8/2011
4										
5										

- CenterName: The Center Name column is the name of the center the child is enrolled at. This field MUST match the center the children belong to's internal ID (go to the center level and select the home menu, then select general to update the field).

- ChildID: The ChildID column is the identification number assigned to the child, there must be a unique number for each child.

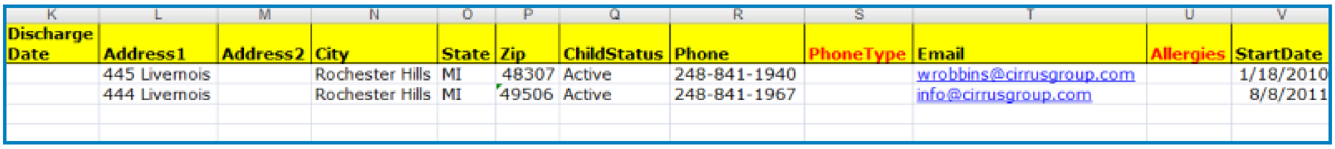
- FamilyID: The FamilyID column is the identification number assigned to the family. All children in the same family MUST have the same family ID number.

- FirstName: The FirstName column is the first name of the child.

- MiddleName: The MiddleName column is the middle name of the child.

- LastName: The LastName column is the last name of the child.

- PreferredName: The PreferredName column is the name the child prefers to be called.
- Birthday: The Birthday column is the date the child was born.
- Gender: The Gender column is the gender of the child. Enter either MALE or FEMALE in the column.
- EnrollmentDate: The EnrollmentDate column is the date the child was enrolled into the center.



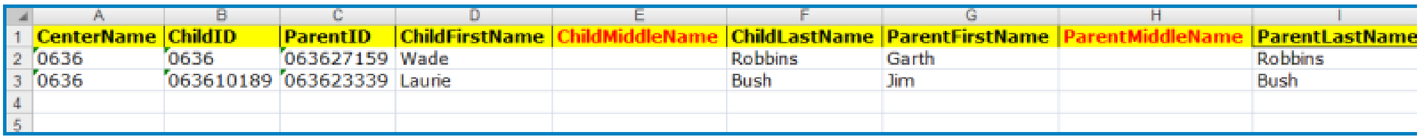
K	L	M	N	O	P	Q	R	S	T	U	V
Discharge Date	Address1	Address2	City	State	Zip	ChildStatus	Phone	PhoneType	Email	Allergies	StartDate
	445 Livernois		Rochester Hills	MI	48307	Active	248-841-1940		wrobbins@cirrusgroup.com		1/18/2010
	444 Livernois		Rochester Hills	MI	49506	Active	248-841-1967		info@cirrusgroup.com		8/8/2011

- DischargeDate: The DischargeDate column is the date the child was discharged or withdrawn from the center. If the child has not been discharged or withdrawn, this column should be blank.
- Address1: The Address1 column is the street address for the child's home
- Address2: The Address2 column is the additional information for the child's address, including suite, apartment or floor number.
- City: The City column is the city the child lives in.
- State: The State column is the state the child lives in.
- Zip: The Zip column is the zip code the child lives in.
- ChildStatus: The ChildStatus column is the current status of the child in the Platform. A child's status can be listed as Active, Pending or Withdrawn.
- Phone: The Phone column is the telephone number associated to the child.
- PhoneType: The PhoneType column is the type of phone number associated to the child.
- Email: The Email column is the email address associated to the child.

- Allergies: The Allergies column is the allergies the child has. To add multiple allergies for a child, separate each allergy by a comma.

- StartDate: The StartDate column is date the child started in the center.

Parent Tab- The parent tab would be where you place parent or guardian information. Each parent only needs to display one time per family. Each parent should have their OWN row. As long as the parent is tied to one of the children the family will load correctly.



	A	B	C	D	E	F	G	H	I
1	CenterName	ChildID	ParentID	ChildFirstName	ChildMiddleName	ChildLastName	ParentFirstName	ParentMiddleName	ParentLastName
2	0636	0636	063627159	Wade		Robbins	Garth		Robbins
3	0636	063610189	063623339	Laurie		Bush	Jim		Bush
4									
5									

- CenterName: The CenterName column is the name of the center the child is enrolled at.

- ChildID: The ChildID column is the identification number assigned to the child.

- ParentID: The ParentID column is the identification number assigned to the parent.

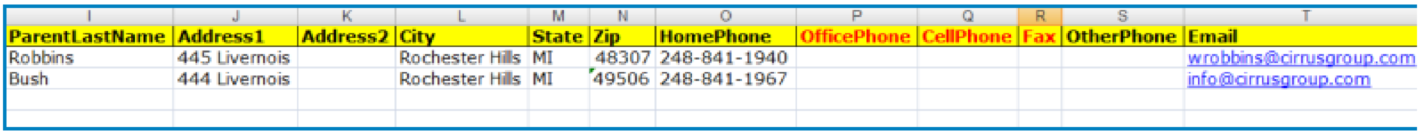
- ChildFirstName: The ChildFirstName column is the first name of the child.

- ChildMiddle: The ChildMiddleName column is the middle name of the child.

- ChildLastName: The ChildLastName column is the last name of the child.

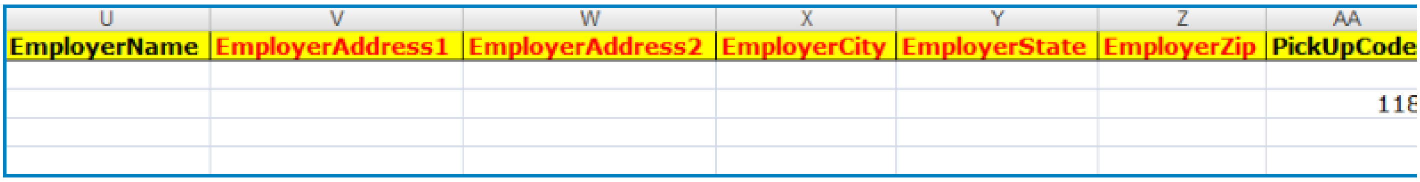
- ParentFirstName: The ParentFirstName column is the first name of the parent.

- ParentMiddleName: The ParentMiddleName column is the middle name of the parent.



I	J	K	L	M	N	O	P	Q	R	S	T
ParentLastName	Address1	Address2	City	State	Zip	HomePhone	OfficePhone	CellPhone	Fax	OtherPhone	Email
Robbins	445 Livernois		Rochester Hills	MI	48307	248-841-1940					wrobbins@cirrusgroup.com
Bush	444 Livernois		Rochester Hills	MI	49506	248-841-1967					info@cirrusgroup.com

- ParentLastName: The ParentLastName column is the last name of the parent.
- Address1: The Address1 column is the street address for the parent's home.
- Address2: The Address2 column is the additional information for the parents' address, including suite, apartment or floor number.
- City: The City column is the city the parent lives in.
- State: The State column is the state the parent lives in.
- Zip: The Zip column is the zip code the parent lives in.
- HomePhone: The HomePhone column is the home telephone number for the parent.
- OfficePhone: The OfficePhone column is the office telephone number for the parent.
- CellPhone: The CellPhone column is the cellular telephone number for the parent.
- Fax: The Fax column is the fax machine number for the parent.
- OtherPhone: The OtherPhone column is any additional telephone number for the parent.
- Email: The Email column is the email address for the parent.



U	V	W	X	Y	Z	AA
EmployerName	EmployerAddress1	EmployerAddress2	EmployerCity	EmployerState	EmployerZip	PickUpCode
						11

- EmployerName: The EmployerName column is the name of the employer for the parent.
- EmployerAddress1: The EmployerAddress1 column is the street address for the

parent’s employer.

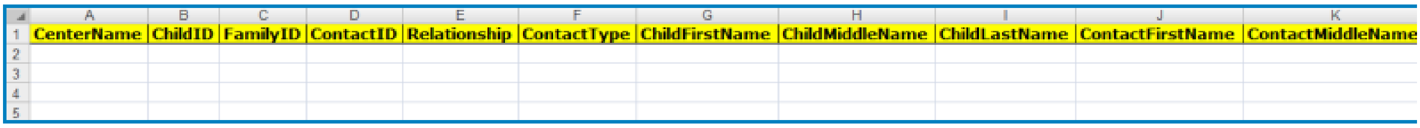
- EmployerAddress2: The EmployerAddress2 column is the additional information for the parent’s employer, including suite, apartment or floor number.

- EmployerCity: The EmployerCity column is the city the parent’s employer is located in.
- EmployerState: The EmployerState column is the state the parent’s employer is located in.

- EmployerZip: The EmployerZip column is the zip code the parent’s employer is located in.

- PickupCode: The PickupCode column is the PIN number a parent uses to check a child into and out of the center using either a computer or touch screen program.

Contacts Tab- Contacts are optional, if you would like to upload contact details be sure each contact has a unique ID and is tied to at least one of the children IDs. Required fields if contacts are to be uploaded are in blue below.



	A	B	C	D	E	F	G	H	I	J	K
1	CenterName	ChildID	FamilyID	ContactID	Relationship	ContactType	ChildFirstName	ChildMiddleName	ChildLastName	ContactFirstName	ContactMiddleName
2											
3											
4											
5											

- CenterName: The CenterName column is the name of the center the child is enrolled at.

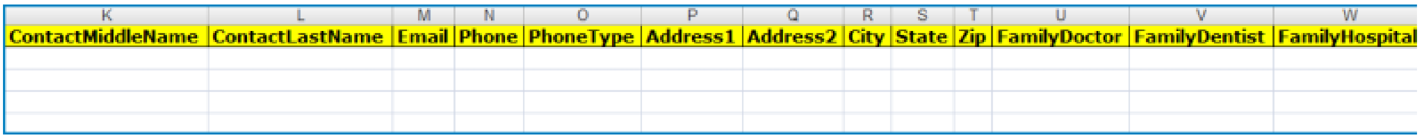
- ChildID: The ChildID column is the identification number assigned to the child.

- FamilyID: The FamilyID column is the family identification number assigned to the family.

- ContactID: The ContactID column is the identification number assigned to the contact for the child.

- Relationship: The Relationship column is the relationship between the contact and the child.

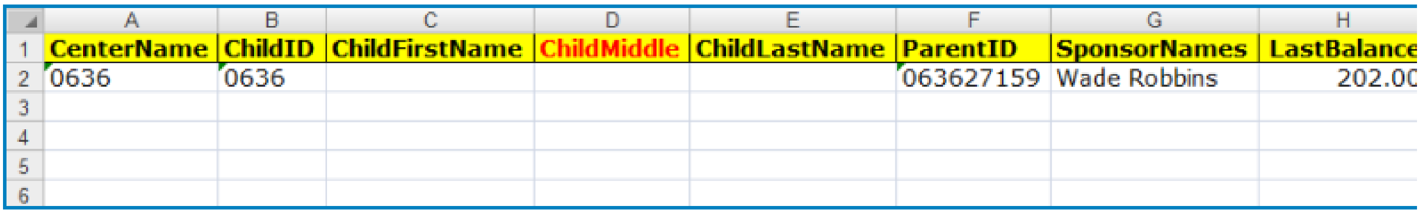
- ContactType: The ContactType column is the Contact Type Valid Value associated to the contact. It is used to assign specific roles to contacts.
- ChildFirstName: The ChildFirstName column is the first name of the child.
- ChildMiddle: The ChildMiddleName column is the middle name of the child.
- ChildLastName: The ChildLastName column is the last name of the child.
- ContactFirstName: The ContactFirstName column is the first name of the contact for the child.



K	L	M	N	O	P	Q	R	S	T	U	V	W
ContactMiddleName	ContactLastName	Email	Phone	PhoneType	Address1	Address2	City	State	Zip	FamilyDoctor	FamilyDentist	FamilyHospital

- Contact MiddleName: The ContactMiddleName column is the middle name of the contact for the child.
- ContactLastName: The ContactLastName column is the last name of the contact for the child.
- Email: The Email column is the email address for the contact.
- Phone: The Phone column is the telephone number for the contact.
- PhoneType: The PhoneType column is the type of phone number, such as Home, Work or Cell phone for the contact.
- Address1: The Address1 column is the street address for the child’s home.
- Address2: The Address2 column is the additional information for the child’s address, including suite, apartment or floor number.
- City: The City column is the city the child lives in.
- State: The State column is the state the child lives in.
- Zip: The Zip column is the zip code the child lives in.
- FamilyDoctor:
- FamilyDentist:
- FamilyHospital:

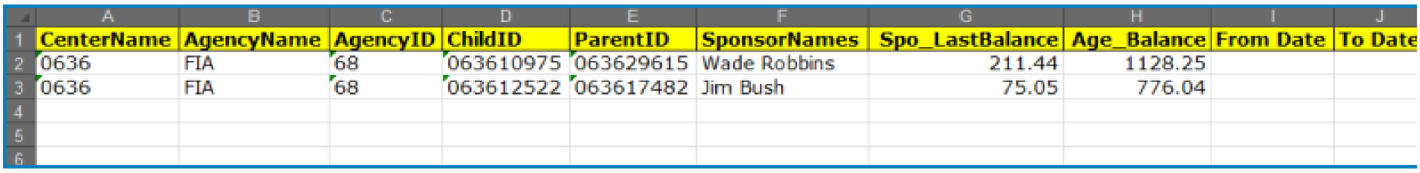
Balance Tab- This tab is used to load balance forwards into the system. This process is typically completed after going live. Required fields are noted in blue below.



	A	B	C	D	E	F	G	H
1	CenterName	ChildID	ChildFirstName	ChildMiddle	ChildLastName	ParentID	SponsorNames	LastBalance
2	0636	0636				063627159	Wade Robbins	202.0
3								
4								
5								
6								

- CenterName: The CenterName column is the name of the center the child is enrolled at.
- ChildID: The ChildID column is the identification number assigned to the child.
- ChildFirstName: The ChildFirstName column is the first name of the child.
- ChildMiddle: The ChildMiddleName column is the middle name of the child.
- ChildLastName: The ChildLastName column is the last name of the child.
- ParentID: The ParentID is the identification number for the parent.
- SponsorNames: The SponsorNames column is the name of the parent or sponsor for the balance.
- LastBalance: The LastBalance column is the last outstanding balance owed by the parent or sponsor.

Agency Tab- This tab is used to load third party balances to child records. This is typically competed after going live. Required fields are noted below in blue.



	A	B	C	D	E	F	G	H	I	J
1	CenterName	AgencyName	AgencyID	ChildID	ParentID	SponsorNames	Spo_LastBalance	Age_Balance	From Date	To Date
2	0636	FIA	68	063610975	063629615	Wade Robbins	211.44	1128.25		
3	0636	FIA	68	063612522	063617482	Jim Bush	75.05	776.04		
4										
5										
6										

- CenterName: The CenterName column is the name of the center the child is enrolled at.
- AgencyName: The AgencyName column is the name of the third party agency assigned to the child. (This is found on the setup > third party tab)
- AgencyID: The AgencyID column is the identification number assigned to the third party agency. (This is found on the setup > third party tab)
- ChildID: The ChildID column is the identification number for the child that has the

third party agency association.

- ParentID: The ParentID column is the identification number assigned for the parent of the child.
- SponsorNames: The SponsorNames is the name of the parent responsible for the child’s outstanding balance that is applied to the family.
- Spo_LastBalance: The Spo_LastBalance is the amount outstanding from the parents for the child’s billing statement.
- Age_Balance: The Age_Balance is the amount outstanding from the third party agency for the child’s billing statement.
- From Date: The starting date for the third party agency's balance. This is used if the third party agency is going to import a past due amount for a specific billing period.
- To Date: The ending date for the third party agency's balance. This is used if the third party agency is going to import a past due amount for a specific billing period.

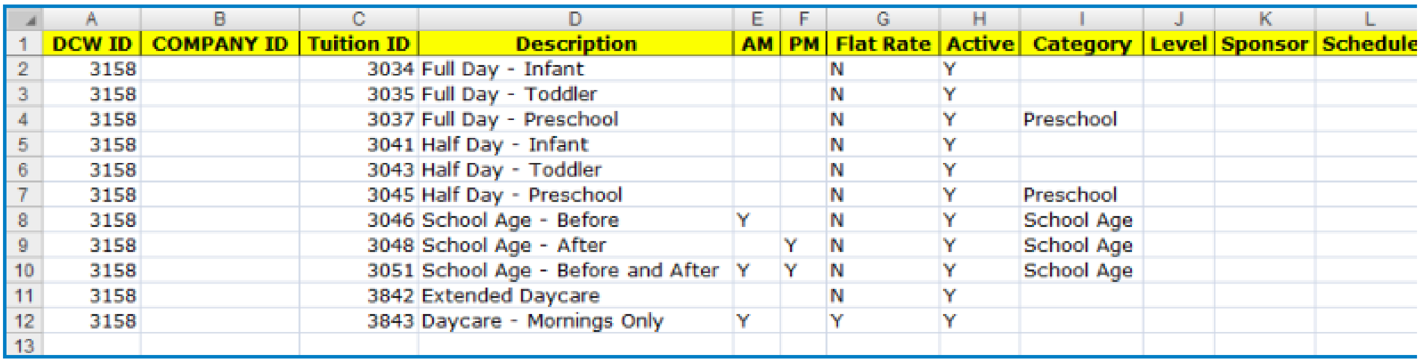
Rate Import Sheet

Last Modified on 06/25/2018 8:53 am EDT

The Rate Import Sheet is used to batch import rates into the system.

To download this spreadsheet, click on the following link: company_rate_export_report.xls 📎

After completing this spreadsheet, return the files to to your account manager or customer service representative.



	A	B	C	D	E	F	G	H	I	J	K	L
1	DCW ID	COMPANY ID	Tuition ID	Description	AM	PM	Flat Rate	Active	Category	Level	Sponsor	Schedule
2	3158		3034	Full Day - Infant			N	Y				
3	3158		3035	Full Day - Toddler			N	Y				
4	3158		3037	Full Day - Preschool			N	Y	Preschool			
5	3158		3041	Half Day - Infant			N	Y				
6	3158		3043	Half Day - Toddler			N	Y				
7	3158		3045	Half Day - Preschool			N	Y	Preschool			
8	3158		3046	School Age - Before	Y		N	Y	School Age			
9	3158		3048	School Age - After		Y	N	Y	School Age			
10	3158		3051	School Age - Before and After	Y	Y	N	Y	School Age			
11	3158		3842	Extended Daycare			N	Y				
12	3158		3843	Daycare - Mornings Only	Y		Y	Y				
13												

- DCW ID: The DCW ID number is the the Platform Identification Number associated to the business level. To view the DCW ID number for the business, click on the General tab on the Home screen. The DCW ID number is the first set of numbers before the dash in the DCW ID row at the top of the Listing Information section. This is a required field.

- Company ID: The Company ID number is the identification number associated to an individual center in the business. To view the business number, first select the center in the Business Level drop down list. Then click on the General tab on the Home screen. The Company ID number is the second set of numbers after the dash in the DCW ID row at the top of the Listing Information section. This is only a required field if the rate is only available at one specific center.

- Tuition ID: The Tuition ID is a system created number for previously created tuitions. If the tuition new and is not being updated, this must be left blank.

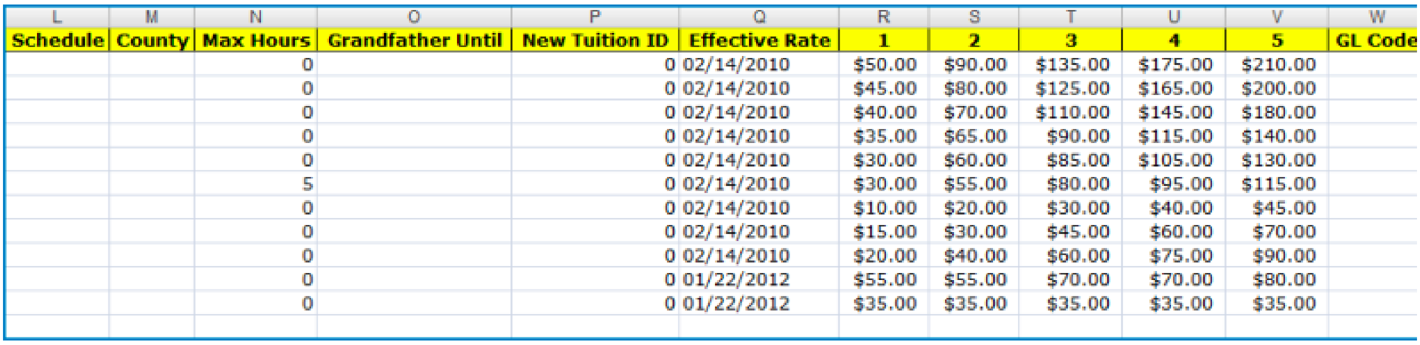
- Description: The Description is the name of the rate. This is a required field.
- AM: The AM column indicates if the rate is only for children attending the AM portion of the classroom. Enter Y in the column to indicate if this rate is only for children attending the AM portion. If the rate is not for children attending the AM

program, the column should be left blank or an N can be entered in the column.

- PM: The PM column indicates if the rate is only for children attending the PM portion of the classroom. Enter Y in the column to indicate if the rate is only for children attending the PM portion. If the rate is not for children attending the PM program, the column should be left blank or an N can be entered in the column.

- Flat Rate: The Flat Rate column indicates if the rate is a flat rate. A flat rate is a rate that charges a child only based on the scheduled number of days for the week. If a child attends more than their schedule, their rate will not increase. Enter Y in the column to indicate if the rate is a flat rate. If the rate is not a flat rate, the column should be left blank or an N can be entered in the column.
- Active: The Active column indicates if the rate is currently active in the center. If a rate is not active, it cannot be selected in the Platform. To indicate a rate as active, enter a Y in the Active column. If the rate is not active, enter an N in the column.

- Category: The Category column indicates if the rate is associated to a rate category. If a rate is associated to a rate category, enter the name of the category in the column. If the rate is not associated to a rate category, the column should be left blank.
- Level: The Level column indicates if the rate is associated to a rate category associated to a center. If a rate is associated to a rate level, enter the name of the rate level in the column. If the rate is not associated to a rate level, the column should be left blank.
- Sponsor: The Sponsor column indicates if the rate is associated to a third party agency. This will only make the rate available to families associated to the third party agency. If a rate is associated to a third party agency, enter the name of the third party agency in the column. If the rate is not associated to a third party agency, the column should be left blank.



L	M	N	O	P	Q	R	S	T	U	V	W
Schedule	**County**	**Max Hours**	**Grandfather Until**	**New Tuition ID**	**Effective Rate**	**1**	**2**	**3**	**4**	**5**	**GL Code**
		0		0	02/14/2010	$50.00	$90.00	$135.00	$175.00	$210.00	
		0		0	02/14/2010	$45.00	$80.00	$125.00	$165.00	$200.00	
		0		0	02/14/2010	$40.00	$70.00	$110.00	$145.00	$180.00	
		0		0	02/14/2010	$35.00	$65.00	$90.00	$115.00	$140.00	
		0		0	02/14/2010	$30.00	$60.00	$85.00	$105.00	$130.00	
		5		0	02/14/2010	$30.00	$55.00	$80.00	$95.00	$115.00	
		0		0	02/14/2010	$10.00	$20.00	$30.00	$40.00	$45.00	
		0		0	02/14/2010	$15.00	$30.00	$45.00	$60.00	$70.00	
		0		0	02/14/2010	$20.00	$40.00	$60.00	$75.00	$90.00	
		0		0	01/22/2012	$55.00	$55.00	$70.00	$70.00	$80.00	
		0		0	01/22/2012	$35.00	$35.00	$35.00	$35.00	$35.00	

- Schedule: The Schedule column indicates if the rate is associated to a schedule Valid Value assigned to a child in the Admission section. If the rate is associated to a schedule, enter the name of the schedule in the column. If the rate is not associated to a schedule, the column should be left blank.

- County: The County column indicates if the rate is associated to a count Valid Value assigned to a child in the Admission section. If the rate is associated to a county, enter the name of the county in the column. If the rate is not associated to a county, the column should be left blank.

- Max Hours: The Max Hours column indicates if the rate has a maximum number of hours that children are allowed to attend a classroom with the rate. If the rate is associated to a maximum number of hours, enter the number of hours in the column. If the rate is not associated to a maximum number of hours, the column should be left blank.

- Grandfather Until: The Grandfather Until column indicates at what date children with this current rate will be allowed to keep the rate until. This is only used when updating pre-existing rates using the Rate Import spreadsheet. If a rate will have a grandfather clause, enter the date the rate will be grandfathered until in the column. If the rate will not have a grandfather clause, this column can be left blank.

- New Tuition ID: The New Tuition ID column indicates if the rate will have a new identification number. If the rate has a new identification number, enter the identification number in the column. If the rate does not have a new identification number, the column can be left blank.

- Effective Date: The Effective Date column indicates the date the rate will go into effect. Enter the date the rate will become effective in the column. This is a required field.
    - 1: The 1 column indicates the amount that will be charged for a child for 1 day of tuition for the week. This is a required field.
    - 2: The 2 column indicates the amount that will be charged for a child for 2 days of tuition for the week. This is a required field.
    - 3: The 3 column indicates the amount that will be charged for a child for 3 days of tuition for the week. This is a required field.
    - 4: The 4 column indicates the amount that will be charged for a child for 4 days of tuition for the week. This is a required field.
    - 5: The 5 column indicates the amount that will be charged for a child for 5 days of tuition for the week. This is a required field.
- GL Code: The GL Code column displays the general ledger code associated to the classroom. If the rate has a general ledger code, enter the GL Code in the column. If the rate does not have a GL Code, the column can be left blank.