Creating Parent Managed Registration & Calendar Rooms

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Parent managed classrooms allow parents to register students for a classroom and select the days the student(s) will attend. Administrators select the available days on a calendar, then parents select the days the student(s) will attend.

Prior to creating the Parent Managed Registration and Calendar rooms, there are three settings that must be turned on in the System Config screen. Navigate to Setup > System Config > Registration and ensure the settings below are set to <u>Yes</u>.

Family Managed Calendar - Show Combined:	Yes 🔻
Family Managed Calendar - Use Daily Rate Only:	Yes 🔻
Family Managed Calendar - Late Fee:	Yes 🔻

Please Note: To view common issues that occur and associated articles in regards to parent managed rooms/calendars, scroll to the bottom of the page.

Creating a Parent Managed Room

Once the above System Config settings are set to Yes, follow the steps below to create the registration room, calendar room, and setup calendar availability.

1. Click Setup, then select Classroom

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습	Но	me	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	٩	
Set	ıp -> Cla	ssroo	m									Seme	ster	
	Sear	rch Pa	anel									Class	room	
	Semeste	r:							•			Class	room Summary	
	FILTE	R										Rates		
												Fees		

2. Click Actions, then select Add New Classroom

Search Panel					
emester:			v		
FILTER					
Actions -			0		
Actions - Add New Classroom	ograms (1)	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5)	X- Supp
Actions - Add New Classroom Add New Category	ograms (1)	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5)	X- Supp
Actions - Add New Classroom Add New Category Category Group	ograms (1)	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5) Operating Capacity	X- Supp + Fee
Actions – Add New Classroom Add New Category Category Group Attendance Group	ograms (1) assroom Nar	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5) Operating Capacity	X- Supp
Actions - Add New Classroom Add New Category Category Group Attendance Group Import Availability Periods	bgrams (1)	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5) Operating Capacity	X- Supp

3. Scroll to the bottom of the page, click the Classroom Type drop-down menu and select Parent Managed Registration

	Extra Program Regist (Registration Setup) (Attribute Setup) (Extra Fee Setup) legacy PM Reg Room Regular (View Semes	 Reoccuring Billing Classroom Event	Availability
	e .	Parent Managed Registration	
	Upload a Classroom Extra Program Regist	Parent Managed Calendar	
	(Registration Setup) (Attribute Setup)	Camp	
	(Extra Fee Setup)	Team	
Classroom Type		Adult	
*Required Field		Registration Only	
	*Classroom Type:	•	

4. The following options are required. Click here for descriptions of all available room configuration options

Parent Managed (Portal)	
Allow Calendar Selection:	Yes •
Calendar Cutoff Day:	Same Day 🔻
Calendar Cutoff Hour:	00 •
Calendar Cutoff Based on Billing Period:	No 🔻
Portal View Selection:	Monthly/Combined
Bill As:	Select Day part Indication
Portal Read Only:	No (Allow Selection)
Use 5 Day rate as max amount:	No 🔻
Use AM/PM Rate if applicable:	No 🔻
Combine Operating Capacity With Program:	Do Not Share Operating Capacity

- Room Name enter the name of the room. Be sure to specify it is the Registration room.
 For example: PM Latchkey Parent Managed Registration
- Classroom Category select a category from the drop-down
- Operating Capacity enter the maximum capacity; a capacity of 0 means unlimited
- Registration Fee enter the registration fee, if applicable
- Billing Period select Daily
- Allow Calendar Selection select Yes
- Calendar Cutoff Day choose the last day parents can select for their student to attend.
 For example: if Day Prior is selected, parents can select the next day for their student to attend. If Week Prior is selected, parents must choose the days at least one week prior to attending
- Portal View Selection select Monthly/Combined
- Bill As choose the correct option from the drop-down
- Portal Read Only choose No (Allow Selection)
- Use 5 Day rate as max amount select No
- Use AM/PM Rate if applicable select No
- Combine Capacity with Program if the program capacity needs to be combine with another program, choose the program in the drop-down menu
- 5. Click Save
- 6. To authorize site(s), do the following: once the Registration room has been setup/saved, click the room name. **Please Note**: single centers do not need to do this step

Actions -			
 No Category (3) 	*Early Childhood (Category) (0) *School Year Care (Category)) (1) *School Year Care- Flexible (Category, F 🕇
Center Level - C	assrooms		
Category	Classroom Name	Operating Capacity	Fee
School Year Care (Ca	tegory)		
1 Programs - Show/H	ide		
Upload a Category Pic	ture		
Registration Setup) 🕤	÷		
Registration Confirm	ation Question)		
0			
	PM Latchkey Parent Managed Registration 🛗 🍯	1 0	
	Regular (View Semester) - Daily - Parent Manage	d Room Availability	
	o		
	Upload a Classroom Picture	0	\$ 0.00
	Extra Program Registration Info 🕂	0	\boxtimes
	(Registration Setup) 🕁		
	(Attribute Setup)		
	(Extra Fee Setup)		

7. Scroll to the bottom of the configuration screen and locate the Authorize Facilities section

Authorize Facilities		
	Center	Action
DCW - Transactional		
DCW Transactional- CENTER 1	Add	
DCW Transactional- CENTER 2	Add	
SAVE		

8. Click Add to authorize each center as needed

Authorize Facilities	
Center	Action
DCW - Transactional	
DCW Transactional- CENTER 1	dd
DCW Transactional- CENTER 2 A	dd
SAVE	

- 9. Click Save
- 10. On the Apply To Center Level Classrooms popup, click Select All to copy all settings to the center level. **Please Note**: this will override all settings set at the center level

Apply To Center Level Classrooms	×
Classroom Name	
Online Description	
Operating Capacity	
Accounting Code	
Registration Fee	
Unscheduled Attendance Fee	
Finishing Text	
Rate	
Rate Category	
Select All Unselect All	
Save	

- 11. Locate the Registration room
- 12. Click View Semester



13. In the Semester drop-down, choose which semester the registration room should be

associated with

Set	etup -> -> Semester				
	Semester Information:				
	Semester:	Select Room Semester	•		

14. Complete the necessary information in the View Semester screen. The following options are

required:

• Enrollment Information section

Enrollment Information	
* Enrollment Start Date:	08/20/2018
* End Date:	06/14/2019
Default Rate:	Use Program Default
Registration Fee:	0.00
1st Sibling Registration Fee:	
Additional Sibling Registration Fee:	
Re-Registration Fee:	
Sponsor Registration Fee:	
Start Hour:	00 • : 00 •
Stop Hour:	00 • : 00 •
Parent Manage Cutoff:	Same Day 🔻

- Enrollment Start Date enter the start date parents should be able to select
- End date enter the last date parents should be able to select. For example, if it is a latchkey program for the entire school year, the enrollment date will be the date when parents can start adding days, the end date will be the last day of the school year
- Registration Information section

I Registration (Online):						
gistration Online:	Open 🔻					
play Online:	Yes 🔻					
at Camp Days as Tuition:	No 🔻					
ed times for plans?	No 🔻					
ndor Name:						
ntact Email:						
/S:	м	т	w	Th	F S	S
ditional Information:						
	© ⊂ International Styles →	Format -	 Ω Image: Font Font The second second	© Size - <u>4</u>	<u>∖</u> - ⊠- X ≣ ?	
	Center List					
				Action	Change Status	Show/Hide
	DCW Transactional	- CENTER 1		Remove	Close	Hide

- Full Registration (Online) check the box
- Registration Online select Open

- Display Online select Yes
- Under Center List, at the bottom of the page, click Add next to each center
- Click Apply to All at the bottom of the screen
- Locate the Center List again and ensure the Show/Hide column says Hide
- 15. Click Save
- 16. Now the Parent Managed Calendar room must be created. Click Setup, then select Classroom

	Search				•								🗮 Bus
ť.	H	lome	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	۹
Set	up -> C	lassroo	m									Seme	ster
	Se	arch Pa	anel									Class	room
	Semes	ter:							•			Classr	oom Summary
	FIL	TER										Rates	
												Fees	

17. Click Actions, then select Add New Classroom

p -> Classroom					
Search Panel					
Gemester:			•		
FILTER					
Actions - Add New Classroom	ograms (1)	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5)	X- Supp
Actions - Add New Classroom Add New Category	ograms (1)	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5)	X- Supp
Actions Add New Classroom Add New Category Category Group	ograms (1) assroom Nat	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5) Operating Capacity	X- Supp
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Actions Add New Classroom Add New Category Category Group Attendance Group Import Availability Periods	ograms (1) assroom Nat	PMC Summer Camp (0)	Special Programs (8)	Summer Camp (5) Operating Capacity	X- Supp

 Scroll to the bottom of the page, click the Classroom Type drop-down menu, and select Parent Managed Calendar

	Upload a Classr]
	Extra Program I		
	(Registration Se	Deservatione Dilline Classes and	
	(Attribute Setu	Reoccuring billing Classroom	
	(Extra Fee Setu	Event	
	School Year- Ca	Event	
	Event (View Ser	Parent Managed Registration	om Availa
	Upload a Class		
	Extra Program	Parent Managed Calendar	
	(Registration Se		
	(Attribute Setu	Camp	
	(Extra Fee Setu	Terre	
		leam	
		Adult	
Classroom Type		Addit	
*Required Field		Registration Only	
		<u> </u>	
	*Classroom Type:	•	

- 19. The following options are required. Click here for a description of all available room configuration options
 - Room Name enter the name of the room. Be sure to specify it is the Calendar room. For example: PM Latchkey Parent Managed Calendar
 - Classroom Category select a category from the drop-down
 - Operating Capacity enter the maximum capacity; a capacity of 0 means unlimited
 - Registration Fee enter the registration fee
 - Billing Period select Daily
 - Allow Calendar Selection select Yes
 - Calendar Cutoff Day choose the last day parents can select for their student to attend.
 For example, if Day Prior is selected, parents can select the next day for their student to attend. If Week Prior is selected, parents must choose the days at least one week prior to attending
 - Portal View Selection select Monthly/Combined
 - Bill As choose the correct option from the drop-down
 - Portal Read Only choose No (Allow Selection)
 - Use 5 Day rate as max amount select No
 - Use AM/PM Rate if applicable select No
 - Combine Capacity with Program if the program capacity needs to be combine with another program, choose the program in the drop-down menu
- 20. Click Save
- 21. Once the calendar room has been saved, click the room name to authorize sites

PM Latchkey Parent Managed Calendar 🛗 🕢 🔂		
Regular (View Semester) - Daily - Parent Managed Room Availability		
0		
Upload a Classroom Picture	0	\$ 0.00
Extra Program Registration Info 🔂	0	\boxtimes
(Registration Setup) 🕀		
(Attribute Setup)		
(Extra Fee Setup)		

22. Scroll to the bottom of the room configuration screen and locate the Authorized Facilities

section

Authorize Facilities	
Center	Action
DCW - Transactional	
DCW Transactional- CENTER 1	Add
DCW Transactional- CENTER 2	Add
SAVE	

23. Click Add under Action column to add the calendar room to each site as needed. When the word "Add" changes to "Remove", the calendar room has been added to the site

Authorize Facilities		
	Center	Action
DCW - Transactional		
DCW Transactional- CENTER 1		Remove
DCW Transactional- CENTER 2		Add
SAVE		

24. Click Save

room name

25. On the Apply To Center Level Classrooms popup, click Select All to copy all settings to the center level. **Please Note**: this will override all settings set at the center level

Apply To Center Level Classrooms	×
Classroom Name	
Online Description	
Operating Capacity	
Accounting Code	
Registration Fee	
Unscheduled Attendance Fee	
Finishing Text	
Rate	
Rate Category	
Select All Unselect All	
Save	

26. Locate the calendar room just created and click the View Semester link directly below the

PM Lat <u>chkey Parent Man</u> aged Calendar 🛗 🕢 🕂		
Regular (View Semester) Daily - Parent Managed Room Availability 🕀		
Upload a Classroom Picture		¢
Extra Program Registration Info 🔂	0	<u>م</u>
(Registration Setup) 🕀		0.00
(Attribute Setup)		
(Extra Fee Setup)		

27. In the Semester drop-down, choose which semester the calendar room should be associated

with. Please Note: this should be the same semester used for the Registration room

Set	etup -> <u>PM Latchkey Parent Managed Calendar</u> -> Semester					
	Semester Information: PM Latchkey Parent Managed	Calendar				
	Semester:	Select Room Semester 🔹				

28. Complete the necessary information on the Semester screen. Below are the required fields,

click here to view descriptions for all available options

• Enrollment Information

Enrollment Information	
* Enrollment Start Date:	08/20/2018
* End Date:	06/14/2019
Default Rate:	Use Program Default
Registration Fee:	0.00
1st Sibling Registration Fee:	
Additional Sibling Registration Fee	
Re-Registration Fee:	
Sponsor Registration Fee:	
Start Hour:	00 • : 00 •
Stop Hour:	00 • : 00 •
Parent Manage Cutoff:	Same Day 🔻

- Enrollment Start Date enter the start date parents should be able to select
- End date enter the last date parents should be able to select. For example, if it is a latchkey program for the entire school year, the enrollment date will be the date when parents can start adding days, the end date will be the last day of the school year
- Registration Information section

Registration Information							
Full Registration (Online):							
Registration Online:	Open 🔻						
Display Online:	No 🔻						
Treat Camp Days as Tuition:	No 🔻						
Need times for plans?	No 🔻						
Vendor Name:							
Contact Email:							
Days:	м	т	w	Th	F	S	S
Additional Information:	Source	3 6 8 8	< 6 8 8	Ĩu ← →	Q 💱 🗎		
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	Contra List						4
	Center List	Center		Action	Change Sta	itus	Show/Hide
	DCW Transactional- Cl	ENTER 1		Remove	Close		Show
SAVE APPLY TO ALL							

- Full Registration (Online) check the box
- Registration Online select Open
- Display Online select No
- 29. Click Save
- 30. To add the calendar room to the necessary site, scroll to the bottom of the screen to add the site(s). Click Add next to each site as needed

Center List			
Center	Action	Change Status	Show/Hide
DCW Transactional- CENTER 1	Add		

- 31. Click Save
- 32. Scroll to the bottom of the screen again. Under the Center List section, ensure the Show/Hide column says "Show"

Center List			
Center	Action	Change Status	Show/Hide
DCW Transactional- CENTER 1	Remove	Close	Show

33. To add days to the calendar room, click Setup, then select Classroom

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습	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	۹
tup -	> Classroo	m									Semes	ter
	Search P	anel									Classro	oom
Sen	nester:							•			Classro	oom Summary
I	FILTER										Rates	
											Fees	

34. Locate the <u>Calendar room just created</u>, and click the Parent Managed Room Availability link

PM Latchkey Parent Managed C	alendar 🛗 🔄 🛟		
Regular (View Semester) - Daily	Parent Managed Room Availability 🕀		
Upload a Classroom Picture			¢
Extra Program Registration Info	0	0	0 00
(Registration Setup) 🕀			0.00
(Attribute Setup)			
(Extra Fee Setup)			

35. Select Quick Entry

Sea	rch			•]									🗏 Busine	ss Level - D
☆	Home	Family	Payments	Attendance	e Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	Q		
Setup -	> <u>PM Late</u>	<u>thkey Pare</u>	ent Managed	<i>Calendar</i> -> D	aily Room Av	ailibility								
Add	New Ava	ilability				Calendar	Period						Quick Entry	
Cla	issroom A	vailability	for PM Latch	nkey Parent I	1anaged Cale	endar								
			Availability D	ate	Сар	acity		Status						
	4 Pag	ie 1 o	f1 🕨 🕅	2							No data to	display		

36. Place a check mark under each day the room will be available. By doing this, parents can

select that day from the parent portal

	,,					
	6	March 2019		Ð		
unday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
24	25	26	27	28	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	6

37. Complete the New Classroom Availability for <Calendar Room Name> section

New Classroom Availability for PM Latchkey Paren	nt Managed Calendar
* Capacity:	0
Status:	Available/Open 🔻
Apply to:	
All:	Yes •
Brand:	Select a Brand 🔻
Division:	Select a Division 🔻
District:	Select a District 🔻
SAVE	

- Capacity enter the number of students that can register each day. Please Note: a capacity of 0 is an unlimited capacity
- Status select Available/Open for parents to be able to select the day
- Apply to All select Yes
- 38. Click Save
- 39. Navigate to the overall availability to ensure the days were successfully added. To do this, click Daily Room Availability above the calendar

Sea	arch			•									IIK
☆	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	۹	
Setup	-> <u>PM Lato</u>	<u>thkey Pare</u>	ent Managed	Calendar - Dai	l <u>y Room Av</u>	<u>ailibility</u> ·	> Quick Ent	ry					
	Classrool	m Availab	dity for PM L	atchkey Parent	Managed (Calendar	0						
Su	inday		Monday		Tuesday	harch 201	Wed	dnesday	Th	ursday		F	riday
	24			25		26		27			28		/
	3		•	4	•	5	•	6	1		7		

40. Each day previously selected from the calendar, will display individually in the Classroom Availability section

ť	ל Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	Q	
Set	tup -> <u>PM Latch</u>	nkey Pare	ent Managed (<i>Calendar</i> -> Dai	y Room Av	ailibility							
	Add New Avail	ability				Calendar	Period						Quick Entry
	Classroom Av	ailability	for PM Latch	ikey Parent Ma	naged Cale	ndar							
			Availability Da	ate	Сар	acity		Statu	5				
	/		04/30/201	9		0		Open(Ch	ange)		\boxtimes		
	/		04/29/201	9		0		Open(Ch	ange)		\boxtimes		
	/		04/26/201	9		0		Open(Ch	ange)		\times		
	/		04/25/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/18/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/17/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/16/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/15/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/12/201	9		0		Open(Ch	ange)		\boxtimes		
			04/11/201	9		0		Onen(Ch	angel			*	
	🛛 🔍 Page	e 1 o	f1 🕨 🕅	~						Disp	laying 1 - 3	87 of 37	

• To edit the information for a specific day, click the modify icon in the first column

습	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	Q
tup	o -> <u>PM Late</u>	chkey Pan	ent Managed	<u>Calendar</u> -> Dai	y Room Av	ailibility						
A	dd New Ava	ilability				Calenda	Period					
C	lassroom A	vailability	y for PM Latcl	nkey Parent Ma	naged Cale	endar						
			Availability D	ate	Cap	acity		Statu	s			
			04/30/201	9		0		Open(Ch	ange)		\boxtimes	^
	1		04/29/201	9		0		Open(Ch	ange)		\boxtimes	
	1		04/26/201	9		0		Open(Ch	ange)		\boxtimes	
			04/25/201	9		0		Open(Ch	ange)		\boxtimes	
	1		04/18/201	9		0		Open(Ch	ange)		\boxtimes	
	1		04/17/201	9		0		Open(Ch	ange)		\boxtimes	
	1		04/16/201	9		0		Open(Ch	ange)		\boxtimes	
			04/15/201	9		0		Open(Ch	ange)		\boxtimes	
	1		04/12/201	9		0		Open(Ch	ange)		\boxtimes	
			04/11/201	9		0		Onen(Ch	angel			•
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• To change the status to Closed, click the Change link in the Status column

dd New Avail	ability		Calendar	Period					Quick I
Classroom Av	ailability for PM Latchke	y Parent Managed Cal	endar						
	Availability Date	Caj	oacity		Status	5			
1	04/30/2019		0		Oper <mark>(Ch</mark>	ange)	×		
1	04/29/2019		0		Open(Ch	ange)	\boxtimes		
1	04/26/2019		0		Open(Ch	ange)	\boxtimes		
1	04/25/2019		0		Open(Ch	ange)	\boxtimes		
1	04/18/2019		0		Open(Ch	ange)	\boxtimes		
1	04/17/2019		0		Open(Ch	ange)	\boxtimes		
1	04/16/2019		0		Open(Ch	ange)	\boxtimes		
1	04/15/2019		0		Open(Ch	ange)	\boxtimes		
1	04/12/2019		0		Open(Ch	ange)	\boxtimes		
	04/11/2019		0		Open(Ch	angel		-	

• To delete a day, click the red X in the far left column

☆	Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	٩	
etup -	-> <u>PM Lato</u>	hkey Par	ent Managed	<u>Calendar</u> -> Dail	y Room Av	ailibility							
Add	New Avai	ilability				Calendar	Period						Quick Entr
Cla	assroom A	vailability	y for PM Latch	nkey Parent Ma	naged Cale	endar							
			Availability Da	ate	Сар	acity		Statu	S				
	1		04/30/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/29/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/26/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/25/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/18/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/17/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/16/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/15/201	9		0		Open(Ch	ange)		\boxtimes		
	1		04/12/201	9		0		Open(Ch	ange)		\boxtimes		
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Common Issues

Below are some common issues with Parent Managed Rooms/Calendars and troubleshooting steps/articles to assist with resolving them.

- The calendar is not appearing for parents to select days via Parent Portal<u>or</u> the wrong calendar is displaying
 - Check that an admin has entered days into the Parent Managed Availability screen
 - Ensure the student is registered into the Parent Managed <u>Registration</u> Room
 - Verify the student is registered into the registration room for the correct center

- If a student will be attending multiple centers, they must have the registration room for each center
- A parent does not have access to a computer, how can an admin/staff member add days for a student?
 - Family Record, Child Tab More, Parent Managed Calendar
- Not all the days are displaying on the calendar
 - The calendar will only display days between the Enrollment start and end dates on the View Semester screen. For example: If the enrollment dates are 01/01/2019-05/31/2019 and 06/01/2019 is entered in the Parent Managed Availability screen, it will not appear on the calendar for the parent to select
- Parents are unsure how to select days from the Parent Portal
 - Selecting days from a calendar
 - Parent Managed registration and calendar selection tip sheet