

# Training Checklist

Last Modified on 02/18/2021 10:03 am EST

## 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	<ul style="list-style-type: none"> <li>• <a href="#">Adding families to the system</a> <ul style="list-style-type: none"> <li>◦ Adding siblings</li> <li>◦ Adding parent information                             <ul style="list-style-type: none"> <li>▪ Accessing the parent portal</li> </ul> </li> <li>◦ Adding contacts to children</li> <li>◦ Setting up an initial program/room assignment</li> </ul> </li> <li>• <a href="#">Basic Reporting</a> <ul style="list-style-type: none"> <li>◦ Reports &gt; Room/Program- student schedule summary- excel</li> <li>◦ Reports &gt; Room/Program - child attendance detail- excel</li> <li>◦ Reports &gt; Room/Program- Health/Allergy- Full List- PDF</li> <li>◦ Reports &gt; Room/Program- Health/Allergy Report for Center- PDF</li> <li>◦ Reports &gt; Room/Program- Weekly Roster Summary- PDF</li> <li>◦ Reports &gt; Room/Program- Weekly Schedule Roster- PDF</li> <li>◦ Reports &gt; Room/Program- As PDF</li> <li>◦ Reports &gt; Room/Program- Weekly AM/PM Sign In- PDF</li> <li>◦ Reports &gt; Room/Program- Extended Registration Questions- Excel</li> <li>◦ Reports &gt; Room/Program- Extended Registration- Excel</li> </ul> </li> </ul>
		<ul style="list-style-type: none"> <li>• <a href="#">Setting up categories, rooms &amp; semesters</a></li> </ul>

Room, Semester & Rate Setup	<i>1-1.5 Hours</i>	<ul style="list-style-type: none"> <li>◦ Semesters</li> <li>◦ Categories</li> <li>◦ Rooms <ul style="list-style-type: none"> <li>▪ Recurring Billing Rooms</li> <li>▪ Events</li> </ul> </li> <li>◦ Semester-Room Associations <ul style="list-style-type: none"> <li>▪ Alternate Methods</li> </ul> </li> <li>• Maintenance/Editing Options <ul style="list-style-type: none"> <li>◦ Cloning a classroom or event</li> <li>◦ Cloning a semester</li> </ul> </li> <li>• Rates <ul style="list-style-type: none"> <li>◦ Adding/Editing Rates</li> <li>◦ Adding/Editing Discounts</li> <li>◦ Adding Scholarship Codes</li> </ul> </li> </ul>
Registration Setup & Approval	<i>30 minutes-1 Hour</i>	<ul style="list-style-type: none"> <li>• Settings up required questions</li> <li>• Setting up extra program questions</li> <li>• Setting up terms and conditions</li> <li>• Adding in extra verbiage <ul style="list-style-type: none"> <li>◦ Registration Start Text <ul style="list-style-type: none"> <li>▪ At the business level</li> <li>▪ At the category level</li> </ul> </li> <li>◦ Descriptions <ul style="list-style-type: none"> <li>▪ At the business level</li> <li>▪ At the category level</li> <li>▪ At the room level</li> </ul> </li> <li>◦ Finishing Text <ul style="list-style-type: none"> <li>▪ At the business level</li> <li>▪ At the category level</li> <li>▪ At the room level</li> </ul> </li> </ul> </li> <li>• Approving Registrations</li> <li>• Registration Reporting <ul style="list-style-type: none"> <li>◦ Reports &gt; Room/Program- Extended Registration Questions- Excel</li> <li>◦ Reports &gt; Room/Program- Extended Registration- Excel</li> </ul> </li> </ul>
		<ul style="list-style-type: none"> <li>• Setting up email <ul style="list-style-type: none"> <li>◦ Server Options</li> <li>◦ System Templates</li> </ul> </li> </ul>

Communications Setup	<i>30 minutes- 1 Hour</i>	<ul style="list-style-type: none"> <li>◦ Custom Templates</li> <li>● Portal Communications <ul style="list-style-type: none"> <li>◦ Creating and Editing Announcements</li> <li>◦ Sending Emails</li> <li>◦ Creating Calendar Events</li> </ul> </li> </ul>
Staff Setup & Scheduling	<i>30 minutes- 1 Hour</i>	<ul style="list-style-type: none"> <li>● Adding admins to the system <ul style="list-style-type: none"> <li>◦ Updating admin passwords</li> </ul> </li> <li>● Adding staff to the system <ul style="list-style-type: none"> <li>◦ Setting up User IDs</li> <li>◦ Setting up PIN numbers</li> </ul> </li> <li>● Setting up Schedules</li> <li>● Editing Staff Security</li> <li>● Adding/Editing Staff Attendance</li> <li>● Staff Reporting <ul style="list-style-type: none"> <li>◦ Reports &gt; Room/Program, Staff Hours</li> <li>◦ Reports &gt; Room/Program, Staff Data</li> </ul> </li> </ul>
Financial Review	<i>1-1.5 Hours</i>	<ul style="list-style-type: none"> <li>● Billing Process <ul style="list-style-type: none"> <li>◦ Transactional billing</li> <li>◦ Defined billing</li> <li>◦ Sending out statements</li> </ul> </li> <li>● Payment receipting <ul style="list-style-type: none"> <li>◦ In batch format</li> <li>◦ By individual family <ul style="list-style-type: none"> <li>■ Processing online payments</li> </ul> </li> <li>◦ Third-party payments</li> <li>◦ Batch and reporting</li> </ul> </li> <li>● Payment reporting- reports &gt; financial <ul style="list-style-type: none"> <li>◦ Credit card reconciliation</li> <li>◦ Payment reconciliation</li> <li>◦ Charges and credits detail &amp; summary</li> </ul> </li> </ul>
Role Setup & Application	<i>30 minutes- 1 Hour</i>	<ul style="list-style-type: none"> <li>● Setting up admin roles <ul style="list-style-type: none"> <li>◦ Admin activities</li> </ul> </li> <li>● Applying roles to admin/staff</li> </ul>
InSite Applications *InSite Classroom *InSite Check-In	<i>30 minutes- 1 Hour</i>	<ul style="list-style-type: none"> <li>● InSite Classroom - classroom management application used by staff/administration by location</li> <li>● InSite Check-In - check in/out application</li> </ul>

\*InSite Parent

used by parents and staff to record time

- InSite Parent- parent facing application