Smartcare™
Leading Edge for Early Learning

Center Web Portal User Guide

Welcome

We are pleased you have chosen to partner with us to help you easily manage the day-to-day business of your childcare center. Our intention is to save you time on the business side so that you have more time with the children you care for.

This guide will help you implement your Smartcare Center App and get to know some of the features that will help you easily manage your center. If you need assistance for any reason, we're here to support you!

Support

Through the Support function, you can access user guides, FAQs, and instructions on how to install the Smartcare Kiosk.

Access the User Guide

1. Log in to Smartcare and scroll to the bottom of any window.
2. Click **User Guide** in the footer.
3. Click **Download now!**

Email Feedback and Include Attachments

1. Click **Settings** in the left Menu. The About window opens.
2. Click **Support** at the top menu.
3. Enter your email, a subject and your message.
4. Click the **paperclip** icon to add an attachment or screen shot if desired.
5. Select a tracking description from the Tracking drop-down menu if desired.
6. Click **Send Feedback**.

Contact Us

Phone: 1-844-SMARTER
Email: support@smartcare.com

Contents

Getting Started

System Requirements

Google Chrome is the preferred browser for optimal compatibility and best user experience with the Smartcare platform.

Log Into the Application

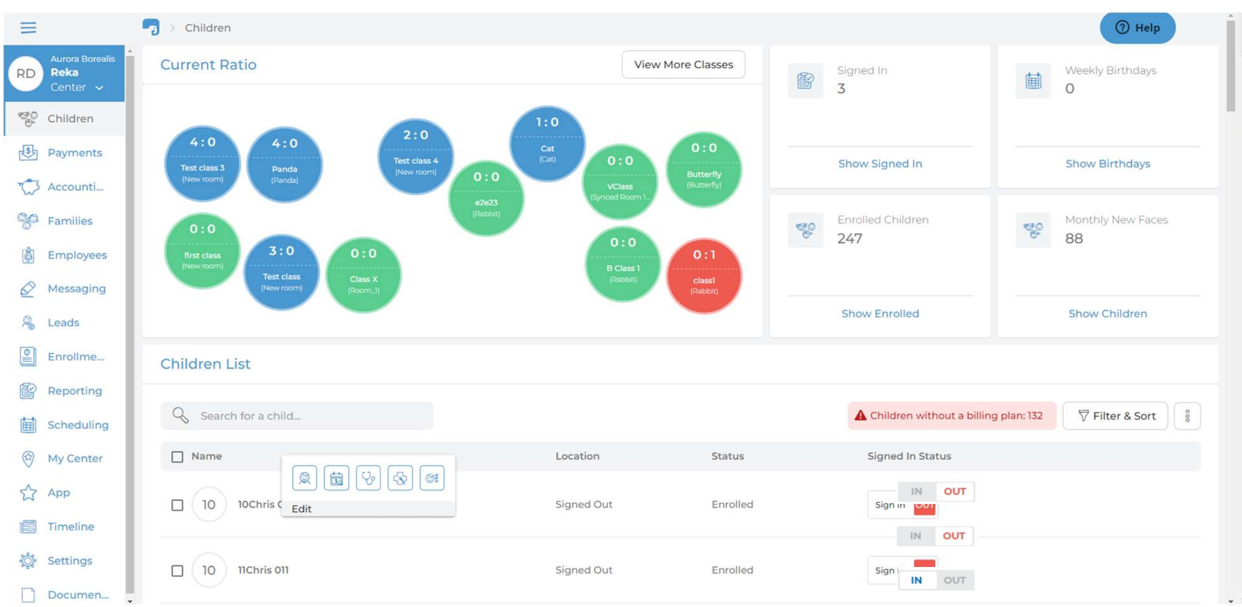
1. Open a browser and go to Smartcare.com.
2. Click **Login** at the top of the window.
3. Enter your email and password and click **Login**.
4. The Dashboard displays child birthdays this week at the top and a list of your children below.

Reset Your Password

1. On the Login window, click **Forgot Password?**
2. Follow the prompts to reset your password.

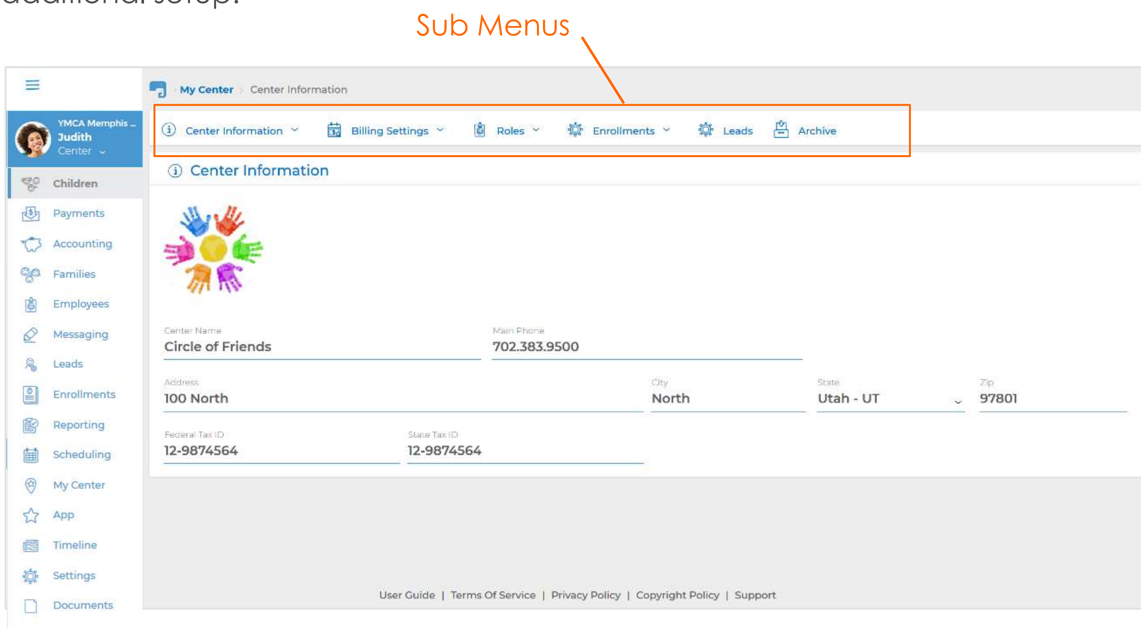
My Center

The My Center settings houses the settings and preferences for your center. You can add buildings, rooms and classes, set up billing and payroll, and view schedules for children and employees.



Set Up My Center

1. Click **My Center** in the left menu.
2. Enter, view or update your center information. See instructions below for additional setup.



Center Information

This is where the main information for your center is stored.

1. Enter your center's name.
2. Enter the main phone number for your center.
3. Enter the address of your center.
4. Enter the Federal and State Tax IDs if desired. This information will display on any tax statements that you generate and send out through Smartcare.
5. If desired, click **Add Photo** and follow the prompts to upload an image or logo.

Set Up Buildings

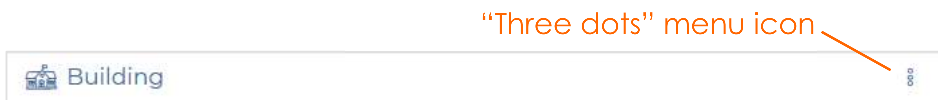
You can set up or make changes to the buildings associated with your center through the My Center settings.

1. Click **My Center** in the left menu.
2. Click **Building** at the top menu. The Building window opens.

Add Rooms

Rooms are physical spaces like classrooms.

1. Click the three dots at the top right and select **Add a room**.



2. Enter the room name or number and the capacity.
3. Enter a description if desired.
4. Click **Confirm** to save.

Add Spaces

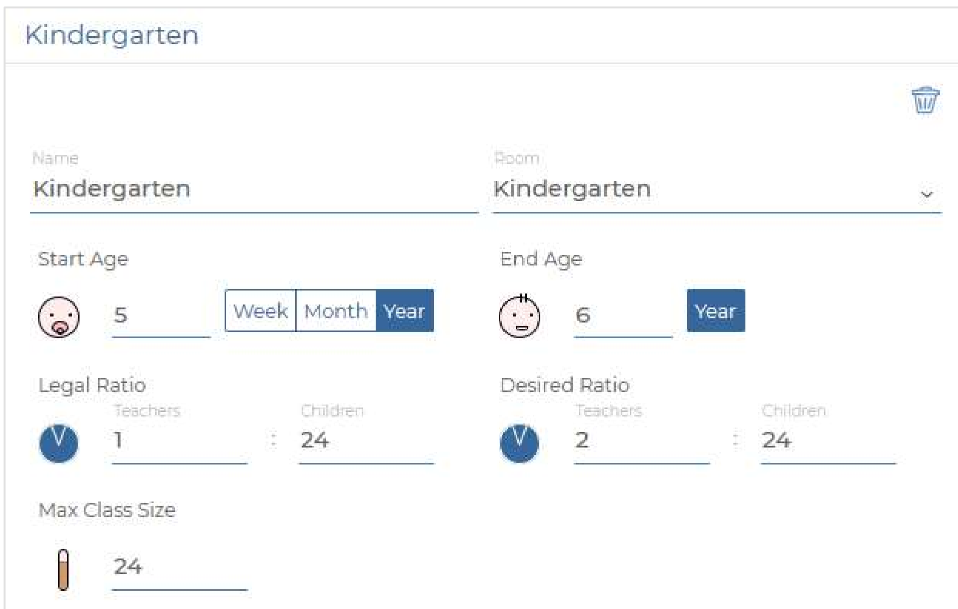
Spaces are physical spaces like playgrounds.

1. Click the three dots at the top right and select **Add a space**.
2. Enter the space name or number and a description if desired.
3. Click **Confirm** to save.

Set Up Classes

Classes are associated with groups of children. You can set up or make changes to the classes associated with your center through the My Center settings.

1. Click **My Center** in the left menu.
2. Click **Classes** at the top menu. The Classes window opens.
3. Click the three dots next to Classes and select **Add new class**.
4. Enter the class information: class name, room assignment, age range, ratio of students to teachers, and maximum class size.
5. Click **Confirm** to save.



Set Up Schools

Schools can be set up to associate with child profiles and also when adding transportation or bus run information. A school can be any location and does not have to be an actual school.

1. Click **My Center** in the left menu.
2. Click **Schools** at the top menu. The Schools window opens.
3. Click the three dots at the top right and select **Add school**.
4. Enter the school name and click **Add School** at the bottom. See also Assign a School to a Child and Add Transportation or Bus Run to a Child's Profile.

Set Up Meal Plans

If your center works with meal programs, such as IEF or FDA, you can set those up through My Center settings.

1. Click **My Center** in the left menu.
2. Click **Meal Settings** at the top menu. The Meal Settings window opens.
3. Click on a meal time to enter the start and end times.
4. Click **Save Changes**.
5. Click the checkbox next to the meal times that apply to the programs for your center. See also Add a Food Program to a Child's Profile.

Set Child Statuses

You can create various child enrollment statuses for your center, such as Enrolled, Unenrolled, Maternity Leave, and then mark a child's profile with the appropriate status.

1. Click **My Center** in the left menu.
2. Click **Child Statuses** at the top menu. The Child Statuses window opens.
3. Click the three dots at the top right and select **Add status**.
4. Enter a name for the Child Status and click **Add Child Status** at the bottom. See also Set the Child Status on a Child's Profile.

Delete Child Status

When you choose to delete a child status, note that you can only delete enrollment statuses that are not assigned to one or more children.

You can run the Current Enrollment Status report to view a list of enrollment statuses and their assignment, and then assign a different child status to any children that have the enrollment status that you want to delete.

1. Click **My Center** in the left menu.
2. Click **Child Statuses** at the top menu. The Child Statuses window opens.
3. Click on a Child Status. The Edit Status side panel opens on the right.
4. Click the three dots at the top right and select **Delete Status**.
5. Click **Delete** to confirm.

Touchless Check In/Out

The Touchless Check In/Out options enable you to give parents the ability to check their child in or out without having to touch the Kiosk. With these options you can enable the touchless check in/out, require a parent signature, set a time to refresh the QR code, and create printable QR codes for multiple drop-off/pickup locations.

1. Click **My Center** in the left menu.
2. Click **Touchless Check In/Out** at the top menu.
3. Click the checkboxes to select or de-select the options for your center.
    - **Allow parents to self check in / out their child(ren):** This enables Touchless Check In/Out. Your Kiosk will display a QR code and parents will have a scanner enabled through the Smartcare Parent App that will read the QR code. From there, parents check a child in or out directly from their mobile device. Parents can still use their key tag or PIN to sign in.
    - **Require parent signature to confirm their child(ren) check in/out:** After scanning the QR code and checking a child in or out, parents will be prompted to provide a signature.
    - **Set refresh time for Kiosk QR Code:** For extra security, allows you to set a time in minutes for when the QR code refreshes.

Create Printable QR Codes

1. Under the Printable QR Codes section, click **Create New Printable QR Code** to the right of the window.
2. Enter a name for the QR code.
3. Set the expiration date and time.
4. Click **Confirm**.
5. Click **Print QR Code**.

Disable QR Code

1. Under the Printable QR Codes section, locate the QR code you want to disable.
2. Click **Disable QR Code**.

Set Up Message Templates

Templates can be created and used with Smartcare messaging. For example, you can create a template for a snow day or meetings/events.

1. Click **My Center** in the left menu.
2. Click **Templates** at the top menu.
3. Click the three dots at the top right and select **Add new template**. The Template Editor opens.
4. Enter a title for the template.
5. Select if this template gets sent to all Leads or all Parents.
6. Select a sub-category from the Category drop-down menu.
7. Enter the message for the template. You can use the formatting tools to create headers, bullet lists, and insert links and images.
8. Use Merge Fields to add personalization or specific information to the message if desired.

9. Click **Save Template** at the bottom.

Delete Message Template

1. Click **My Center** in the left menu.
2. Click **Templates** at the top menu.
3. Locate the template you want to delete and click on it to open.
4. Click the three dots at the top right and select **Delete Template**.
5. Click **Remove**.

Note: A template being used in an automated email campaign, such as in a Lead Workflow, cannot be deleted until it is removed from the workflow.

Set Up User Roles

User roles determine the user permissions for each of your staff. Generally, you will only need these three roles: Director, Teacher, Admin. See table below for access details.

1. Click **My Center** in the left menu.
2. Click **Roles** at the top menu. The Roles window opens.
3. Click the three dots at the top right and select **Add role**.
4. Enter a name for the role.
5. Check only the sections you wish the role to have access to and select **View** or **Edit**.
    a. **View:** Allows the user to view only.
    b. **Edit:** Allows the user to make changes to data. When you select Edit, View is automatically selected.
    c. **No Selection:** The function is hidden from the user.
6. Click **Add Role** at the bottom.

Section	Data Access
Center Settings	• Center Information • Building • Classes • Schools • Meal Settings • Templates • Roles • Users • Enrollment Configuration • Enrollment Statuses • Leads • Door Lock Configuration • Door Lock Default Access • Door Lock Status Management • Archive • Center Settings

Section	Data Access
	• Custom Fields • Documents

Center Financial Data	• Payments
	  ○ Agency Payments
	  ○ View Allocations
	• Accounting
	  ○ Accounts
	  ○ Account Ledger: View Transactions
	  ○ Balance
	  ○ Agency Ledgers
	  ○ QuickBooks Configuration (integration enabled)
	  ○ Remittances
	• My Center
	  ○ Billing Settings
	  ○ Accounting Settings: Remittance, Auto-Pay, Accounting Codes
	  ○ Payroll
	• Documents

Family/Child Data	• Children
	  ○ Children List, Location, Status
	  ○ Profile
	  ○ Pickup People
	  ○ Medical
	  ○ Allergies
	  ○ Shots
	  ○ People
	  ○ Attendance
	  ○ Emergency Contacts
	  ○ Timeline

Section	Data Access
	◦ Notes ◦ Documents • Families ◦ Medical ◦ People ◦ Additional Info ◦ Notes ◦ Documents • My Center ◦ Enrollments • Timeline • Documents
Family/Child Financial Data	• Payments ◦ Family Accounts ◦ Accounts Receivable • Accounting ◦ Accounts ◦ Account Ledger: View Transactions ◦ Balance ◦ Child Billing Setup ◦ Tax Statements • My Center ◦ Billing Settings • Documents
Employee Data	• Employees ◦ Profile ◦ User Role ◦ Medical ◦ Time Sheet • Timeline

Section	Data Access
	• Documents

Employee Financial Data	• Employees
	  ○ Positions
	  ○ Notes
	• Documents

Reporting	• Reports • Documents
System Emails	• Smartcare system emails
Bulk Messaging	• Bulk Messaging

Teacher App	• Classes
	  ○ Sign Children In/Out
	  ○ View Individual and Class Timeline
	  ○ View Child Allergies
	  ○ Add Children
	  ○ Select Class Location
	  ○ Add Timeline Entry
	  ○ View Child Profile
	• Timeline

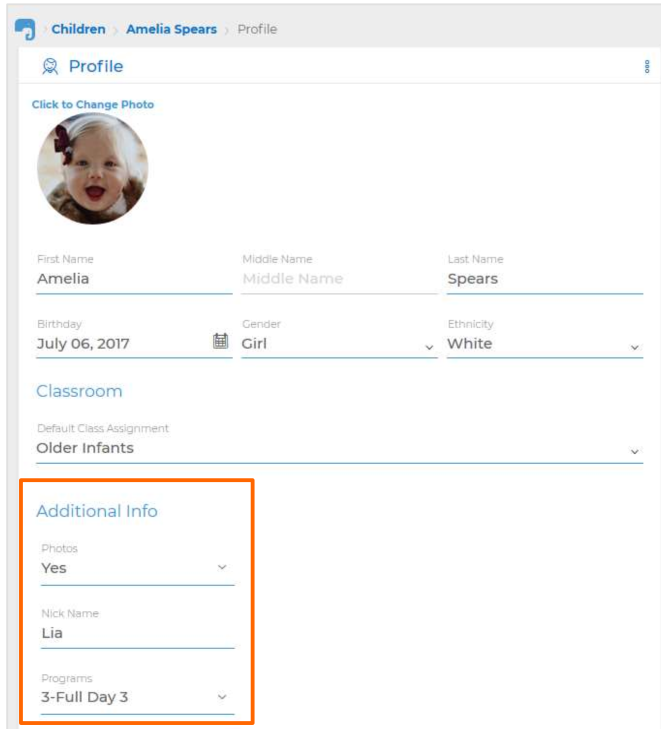
Kiosk Admin	• Kiosk Sign-in/out as Admin

Manage Custom Fields

You can create custom data fields for child, family, adult, employee and lead records.

Custom fields display under the following sections of the individual record:

- Children: Profile
- Families: Additional Info
- Adults (Parents/Guardians): Profile
- Employees: Profile
- Leads: Additional Info



Create a Custom Field

1. Click **My Center** in the left menu.
2. Click **Custom Fields/Tags** at the top menu. The Custom Fields/Tags window opens.
3. Click on a category under the Custom Fields section to open a list of custom fields on the right for that record type. (This will be blank if you haven't created any.)
4. Click the three dots and select **Add new custom field**. The custom field is automatically marked "Active."
5. Enter the Field name. This name will appear on the record.
6. Select the data type from the drop-down list.
   Note: Selecting "Options" enables you to create a list with multiple values.
7. Click **Save changes** at the bottom. The custom field will now appear in the record type for the category you selected.

Edit a Custom Field

1. Click **My Center** in the left menu.
2. Click **Custom Fields/Tags** at the top menu. The Custom Fields/Tags window opens.
3. Click on a category under the Custom Fields section to open a list of custom fields on the right.
4. Click on the custom field in the list you want to edit.
5. Make your changes and click **Save changes** at the bottom.

Deactivate a Custom Field

1. Click **My Center** in the left menu.
2. Click **Custom Fields/Tags** at the top menu. The Custom Fields/Tags window opens.
3. Click on a category under the Custom Fields section to open a list of custom fields on the right.
4. Click on the custom field in the list you want to deactivate.
5. Click **Save changes** at the bottom.

Manage Tags

Tagging gives you the ability to identify groups of children, families, employees, leads or people (anyone related to families) based on a specific tag. Tags are created under My Center and can then be used with various records, bulk updates, filtering, messaging or even reporting.

Create a Tag

1. Click **My Center** in the left menu.
2. Click **Custom Fields/Tags** at the top menu. The Custom Fields/Tags window opens.
3. Enter a Tag name of your choice in the blank field under the Tags section and press **Enter** on your keyboard.
4. Select one or more data sets (children, families, employees, leads, people) where you want to make the tag available.

   For example, if you select "children," then this tag will be available when working with children profiles, filtering, reporting, or bulk updates.

   Note: You can change the data set selection at any time by checking or unchecking a data set.

Edit a Tag Name

1. Click **My Center** in the left menu.
2. Click **Custom Fields/Tags** at the top menu. The Custom Fields/Tags window opens.
3. Click on the Tag name under the Tags section that you want to edit.
4. Make changes to the Tag name and press **Enter** on your keyboard.

Delete a Tag

1. Click **My Center** in the left menu.
2. Click **Custom Fields/Tags** at the top menu. The Custom Fields/Tags window opens.
3. Click the **X** on the Tag name under the Tags section.
4. Click **Confirm** to delete.

Set Up Immunizations

Add an Immunization

1. Click **My Center** in the left menu.
2. Click **Immunizations** at the top menu. The Immunizations window opens.
3. Click the three dots at the top right and select **Add new immunization**.
4. Select the immunization from the drop-down list or enter the name for a custom immunization.
5. Enter the number in months that the first dose is due from birth.
6. Click the **plus** icon to add when the next does is due if desired.
7. Click the **trash** icon to delete a dose date if desired.
8. Click **Add Immunization** at the bottom.

Deactivate an Immunization

It is recommended that you deactivate immunizations instead of deleting them. Deactivating an immunization schedule will remove the immunization schedule from children's profiles but will keep the past immunization data for your records. You can also deactivate an immunization on a child's profile.

1. Click **My Center** in the left menu.
2. Click **Immunizations** at the top menu. The Immunizations window opens.
3. Locate the immunization in the list and uncheck the box. Click **Save changes** in the lower right of the window. The immunization is now removed from children's profiles.

Center Settings

Through Center Settings, you can set the preferences described below.

1. Click **Center Settings** at the top menu. The Center Settings window opens.
2. Click the checkboxes to select or de-select the options for your center.
   - **Children:** Automatically sign in children to their default class.
   - **Teachers:** Automatically sign in teachers to their default class.
   - **Teachers:** Allow teachers to see parents' contact information.
   - **Teachers:** Allow teachers to clock in / out using Parent App.
   - **Timeline Approval:** Allow directors to approve or reject timeline entries.
   - **Timeline Allow Multiple Contributors:** Allow teachers to see and edit timeline entries created by other teachers.
   - **Center Info Page for Parent App:** Enable your center's information page to be visible in the Smartcare Parent app.
   - **Kiosk, Enable Just Visiting:** This option must be enabled at the enterprise level in order to set it at the center level. Allows employees and parents to access your center without clocking/signing in.
   - **Kiosk, Enable 4 Digit PINs:** When this is enabled, parents and employees can clock/sign in using a 4-digit PIN instead of 8. The 4-digit PIN is the first four numbers of a person's 8-digit PIN.
   - **Kiosk, Enable electronic signature for parents:** You can enable this feature when your state or local agency requires parents to sign their name when checking their child in and out of your center. These electronic signatures are captured in the Child Attendance List report.
   - **Auto Sign-Out:** Set the default time for automatic daily sign out for children and employees. Check "Move classes back to default rooms at auto sign-out time" if desired.
   - **Health Checks:** Tap this option to enable a health check questionnaire at check-in. Health check questionnaire can be created through the Smartcare Center App.

Change Password

If at any time you need to change your password, you can do so through Settings.

1. Click **Settings** in the left menu. The About window opens.
2. Click **Change Password** at the top.
3. Enter your current password.
4. Enter your new password and enter again to confirm.
5. Click **Save Changes**.

Change Email

If at any time you need to change your email, you can do so through Settings.

1. Click **Settings** in the left menu. The About window opens.
2. Click **Change Email** at the top.
3. Enter your current email address.
4. Enter your new email address.
5. Click **Save Changes**.
6. Enter your email, a subject and your message.
7. Click the **paperclip** icon to add an attachment or screen shot if desired.
8. Select a tracking description from the Tracking drop-down menu if desired.
9. Click **Send Feedback**.

Download Smartcare Apps

The Smartcare suite of applications is also available for multiple devices including iPad, iPhone, and Android. You can download these apps in various ways.

Download From Center Web Portal

For Android, Kiosk, Center App, iPhone, and iPad

1. Using your mobile device, open a browser and go to www.Smartcare.com.
2. Click **Login** at the top of the window.
3. Enter your email and password and click **Login**.
4. Click **App** in the left menu. A list of downloads opens.
5. Click **Download** under the appropriate app for your device.
6. Follow the prompts to install.

Download From Google Play Store

For Android and Kiosk

1. On your Android or Smartcare Kiosk, open the Play Store and search for "Smartcare for Parents" or "Smartcare Kiosk."
2. Tap **Install** to download it.

Download From Apple Store

For iPhone

1. On an iOS device, open the **App Store** and search for "Smartcare for Parents" or "Smartcare Kiosk."
2. Install the application. You may be prompted to enter your Apple ID and password.

Log Out

1. Click the Director drop-down menu under your name in the top left and select **Log Out**.

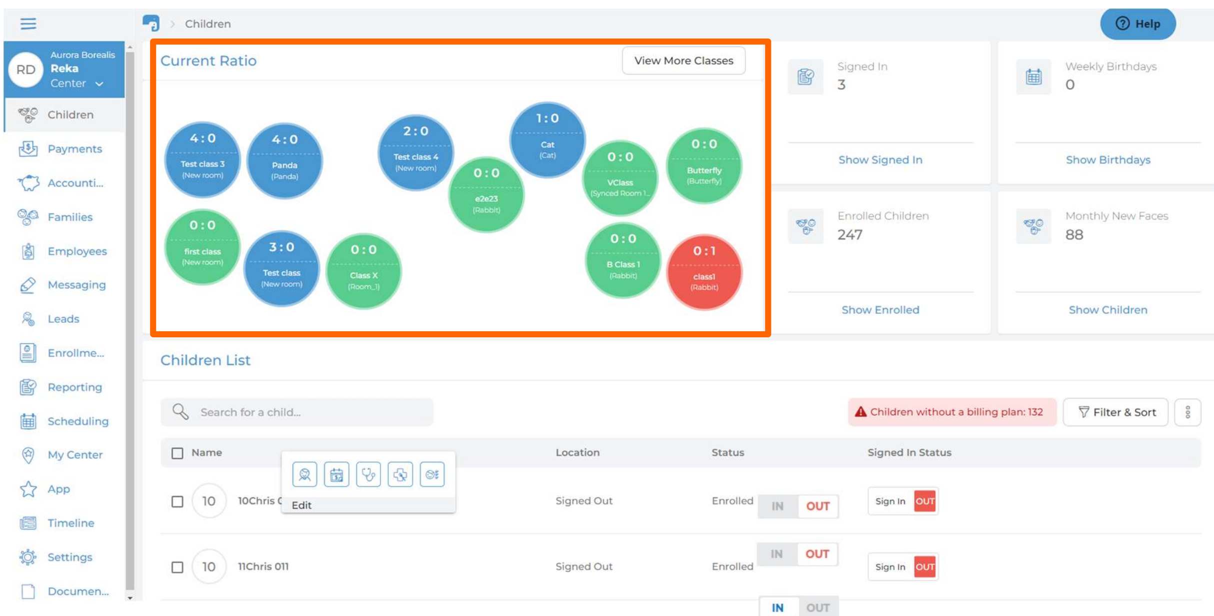
Dashboard

When you log into Smartcare Center, the default window is the Current Ratios Dashboard at the top and a list of your children. Click the left or right arrows on the Dashboard to view additional snapshots for your center.

Current Ratios

Displays the current child/teacher ratio for each class and is color-coded. See Set Up Classes about defining ratios. This screen updates in real time as children and teachers check in and check out.

Click on a bubble to view the list of children in that class.



a. Green: Class is at desired ratio (if defined), or at the legal ratio (if no desired ratio has been defined) or no one has checked into the class

b. Blue: Class is under the desired ratio (if defined), or under the legal ratio (if no legal ratio has been defined)

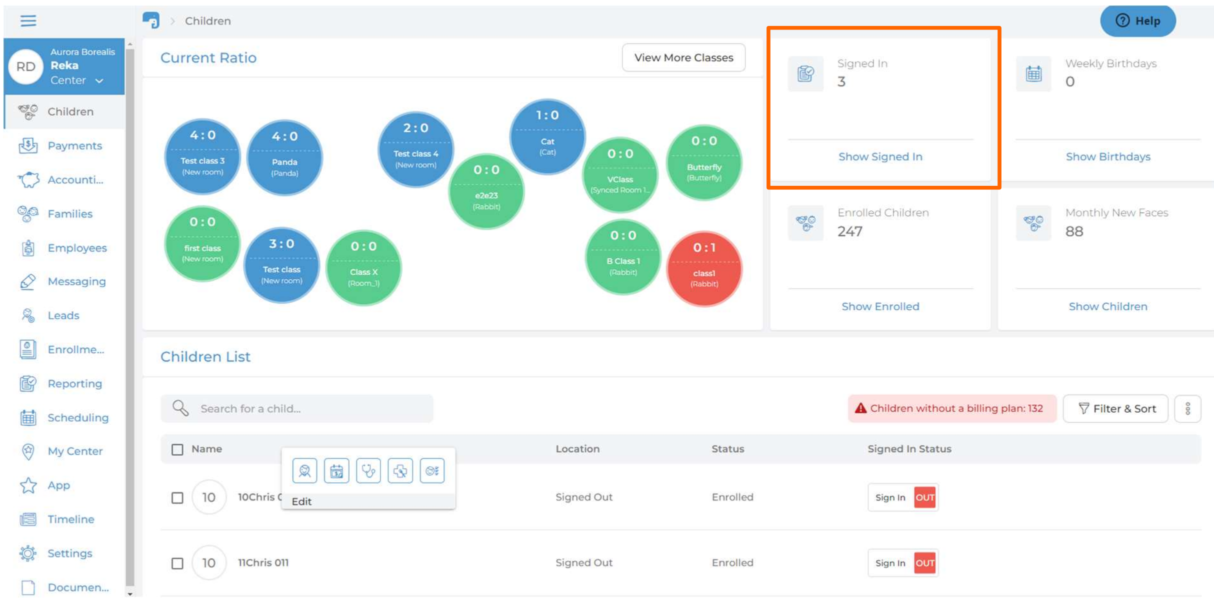
c. Yellow: Class is over the desired ratio but at or under the legal ratio

d. Red: Class is over the legal ratio

Signed In

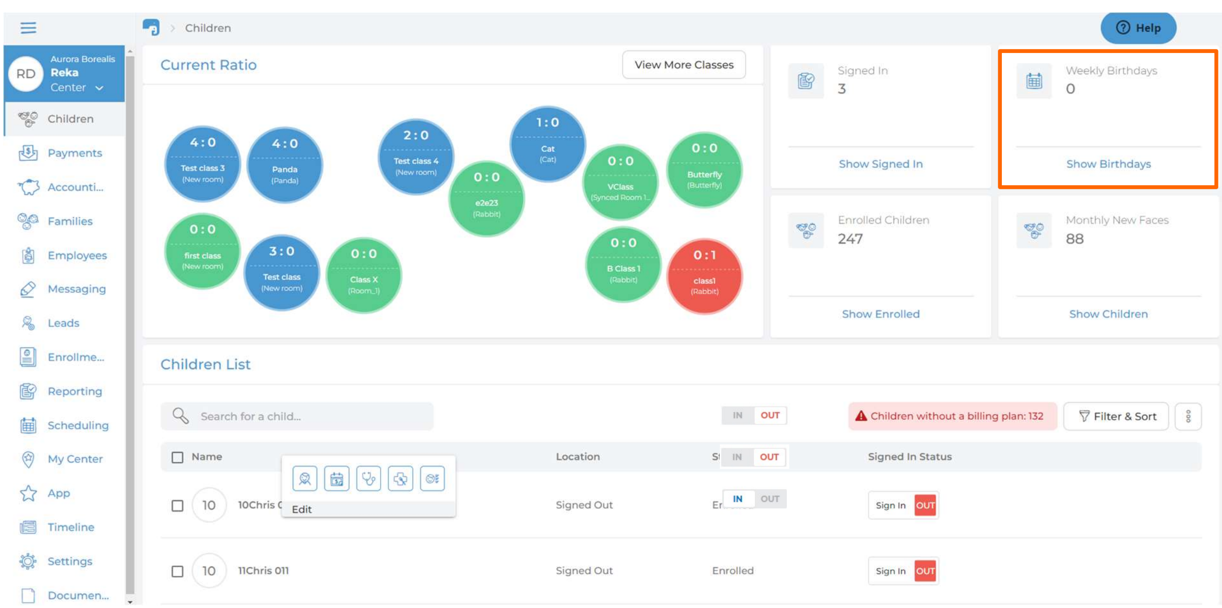
Displays the number of children signed in (clocked in) to your center on that day. Click **Show Sign In Children** to view the list of those children.

- "Location" indicates the class the child is signed into.
- "Signed In Status" indicates the clock in/clock out status of each child for your center.



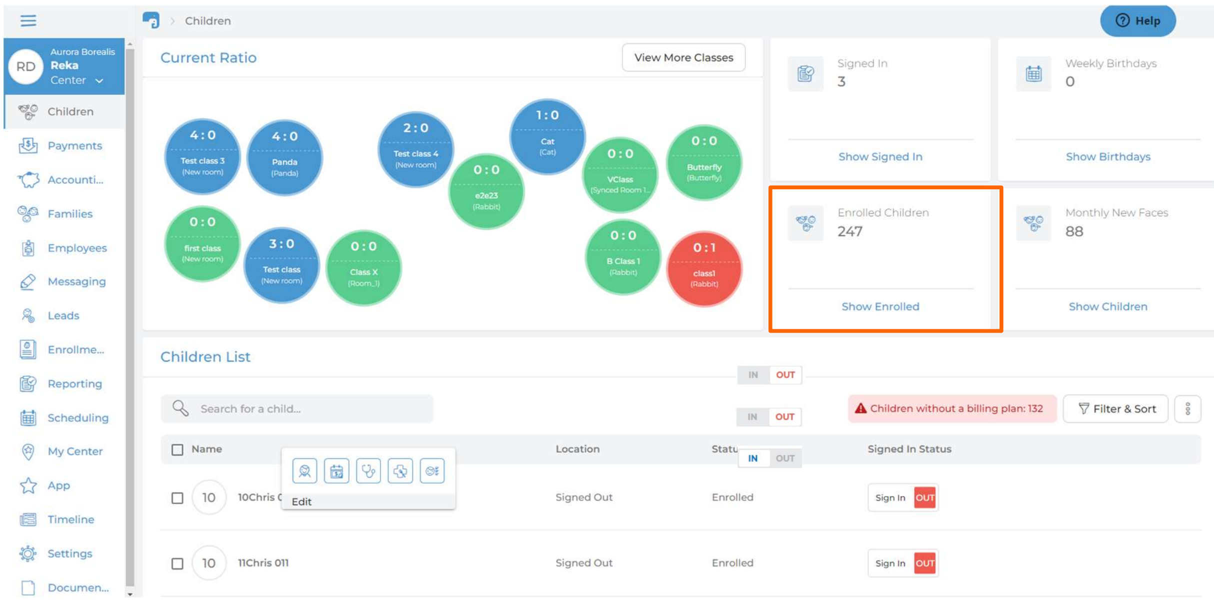
Birthdays

Displays the week's birthdays. Click **Show Birthdays** to view the list of children's birthdays during that week.



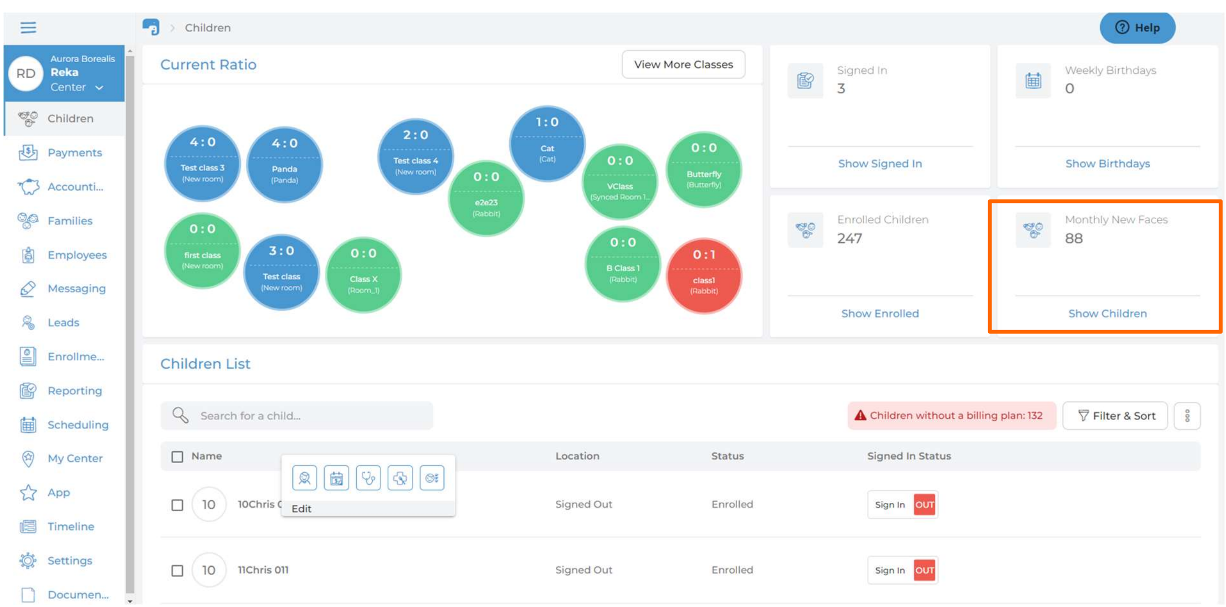
Enrolled Children

Displays the total FTEs (Full Time Enrollments) based on children's schedules entered. Click **Show Enrolled** to view the list of enrolled children in your center.



New Faces

Displays the number of new children for the month. Click **Show Children** to view the list of new children in your center.

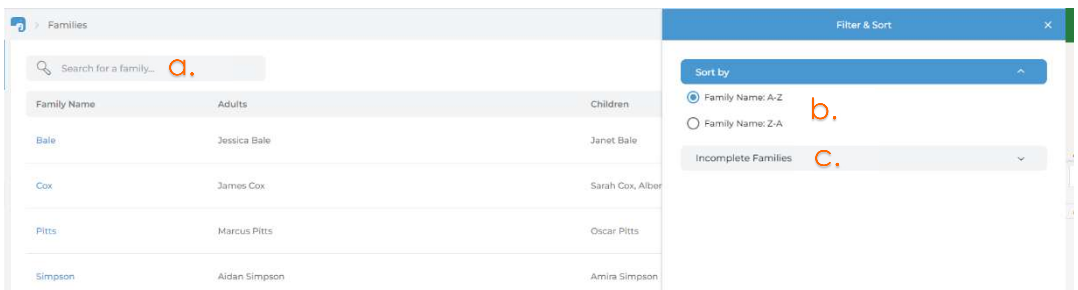


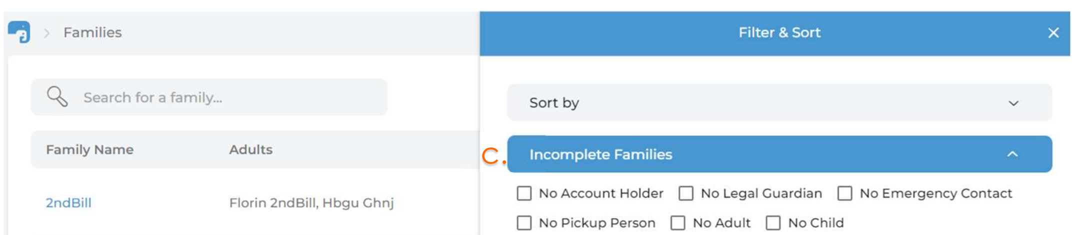
Manage Child & Family Data

Manage Families

Search and Sort Families List

1. Click **Families** in the left menu. Your list of families opens.
    a. Enter all or part of a name and click **Enter** on your keyboard to display all matches to your entry.
    b. Click on a box to sort by first or last name.
    c. Click on boxes to filter by Incomplete Families. This includes families with no account holder, no legal guardian, no emergency contact, no pickup person, no adult, or no child.

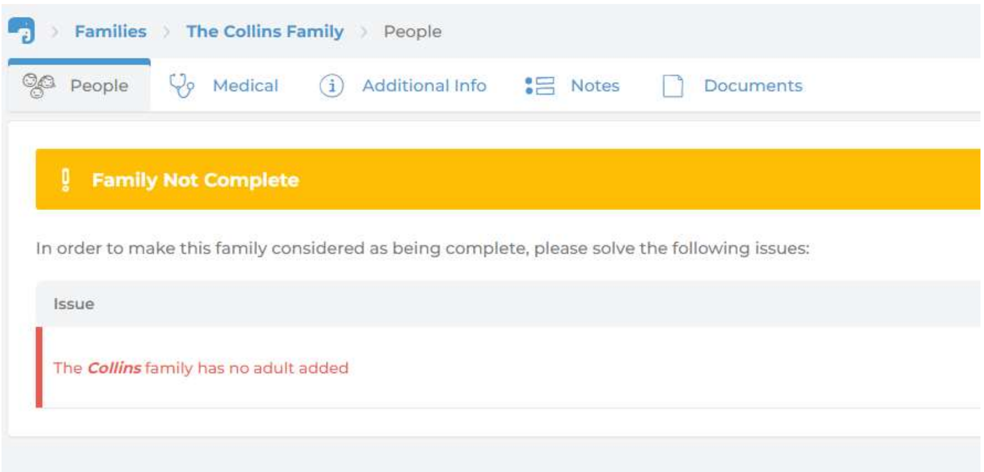




Add a Family

1. Click **Families** in the left menu. Your list of families opens.
2. Click **Add Family** at the top right.
3. Enter a family name.

Note: The full creation of a family is not complete until appropriate adults and children are added along with their responsibilities and permissions are added. The specific family's dashboard will show "Family Not Complete" if information is missing and list what must be added to complete the family.

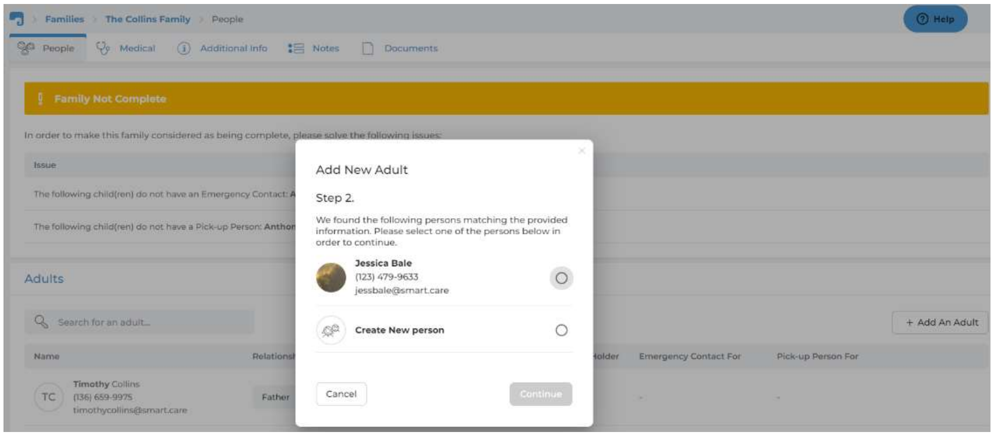


Add an Adult

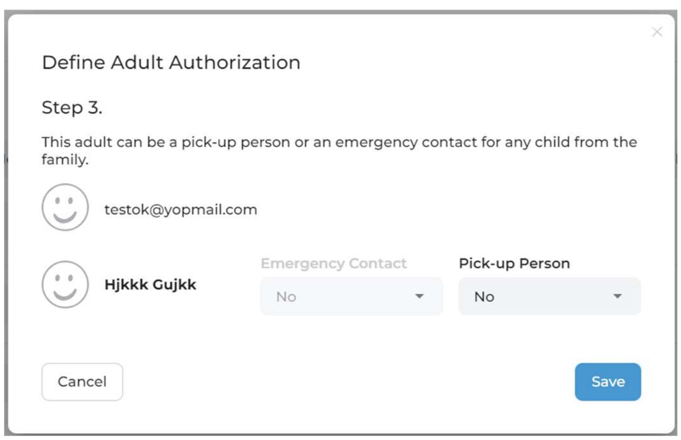
1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family to add an adult and click on the row to open it. The Family Profile window opens.
3. Click **Add An Adult.**
4. Enter adult's details to determine if that adult already exists within the center to prevent duplicate accounts. You can check by email, phone number or first and last name.

Note: An error message will appear if the details of the user exist in a separate tenant.

5. Select an existing adult if that person matches or click **Create New Person**. Note: The option of Creating a New Person can be used only if adding the adult using an existing phone number or first and last name.
   a. If using an existing adult in the center, select the Relationship to Children for the family you are creating and click **Add Adult.**
   b. If creating a new adult, enter in required and optional information about the adult and click **Create Adult.**



   c. If desired, click the box to define authorization rights for this adult being created. This allows for the adult to be assigned as a pick-up person or an emergency contact for any child from the family. Once complete, click **Save.**

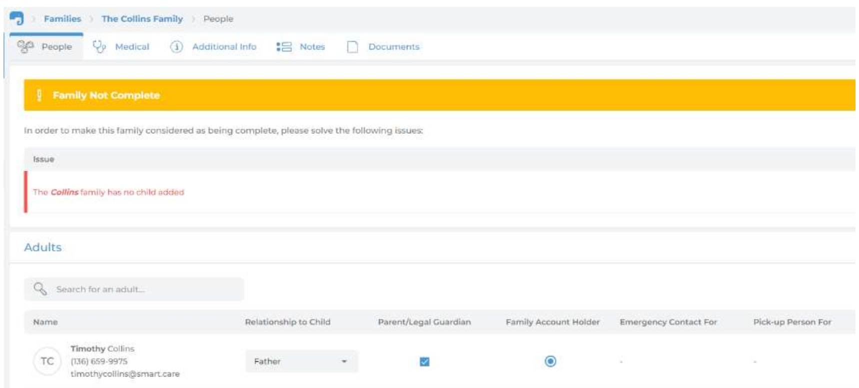


6. Click **Add An Adult** again to add another person if applicable.

Manage Adult(s) in a Family

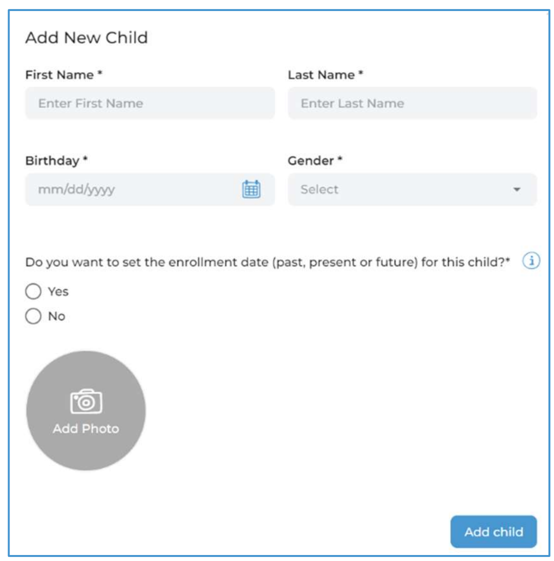
1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family and click on the row to open it. The Family Profile window opens.
3. Modify the Relationship to Child in the family
4. Select what adult(s) are Parent/Legal Guardians
5. Select what adult is the Family Account Holder

Note: A family must have an adult, child, account holder, and parent/legal guardian, to be considered complete.



Add a Child from the Family Menu

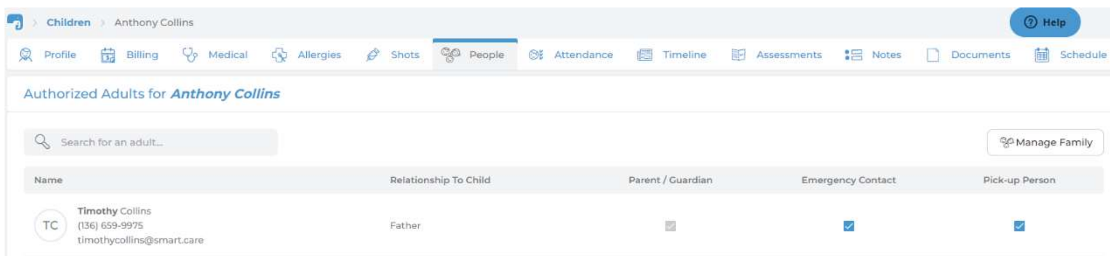
1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family and click on the row to open it. The Family Profile window opens.
3. Click **Add A Child** in the top right.
4. Enter the child's required information. You can type in the birthday.
5. Select to enroll the child at a past, present, or future date
    a. If **Yes** is selected, the next step will be to select a date
6. Click **Add A Child** again to add another person if applicable



Note: Each child must have an emergency contact and pick-up person to be considered complete

Manage Child(ren) in a Family

1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family and click on the row to open it. The Family Profile window opens.
3. Scroll over a child and select Manage People.
4. Select which adult is that child's Emergency Contact and Pick-Up Person.
5. Click **Manage Family** when complete to return to the individual family's dashboard.



Manage Family Notes

Add a Family Note

1. Click **Families** in the left menu. Your list of families opens.
2. Select a family from the list. The family's record opens.
3. Select the **Notes** box. The Notes window opens.
4. Click the three dots in the top right and select **Add a Note**.
5. Enter the note and select the date.
6. Click **Add Note** to save.

Note: Notes can only be edited or deleted by the original user who created the Note in the profile.

Edit a Family Note

1. Click the **Notes** box on the family's profile page.
2. Click the note you want to edit.
3. Make your edits and click **Save changes**.

Delete a Family Note

1. Click the **Notes** box on the family's profile page.
2. Click the note you want to delete.
3. Click the three dots in the top right and select **Delete this note**.
4. Click **Yes** to confirm.

Manage Family Documents

Add a Document to a Family's Record

The following file types can be added to a family's record under the Documents section: .doc, .docx, .xls, .pdf, .tif, .tiff, .png, .jpeg, .jpg, .gif

1. Click **Families** in the left menu. Your list of families opens.
2. Select a family from the list. The family's record opens.
3. Select the **Documents** box. The Documents window opens.
4. Click the three dots in the top right and select **Add a document**. You are then prompted to locate the document on your computer.
5. Enter a File Name if different than the default shown.
6. Enter a note if desired.
7. Click **Upload Document**.

Edit a Document's Name or Notes on a Family's Record

1. On the family's record, click the **Documents** box. The Documents window opens.
2. Click on the row of the document you want to edit.
3. Make your changes and click **Save Changes**.

Delete a Document on a Family's Record

1. On the family's record, click the **Documents** box. The Documents window opens.
2. Click on the row of the document you want to delete.
3. Click the **trash** icon.

Archive an Adult

1. Click Families in the left menu. Your list of families opens.

2. Locate the family and click on the row to open it. The Family Profile window opens.
3. Locate the adult and click **Archive**.

Archive a Child

1. Click Families in the left menu. Your list of families opens.
2. Locate the family and click on the row to open it. The Family Profile window opens.
3. Locate the child and click Archive

Archive a Family Record

When you archive a family record, note that all financial and billing history will be deleted, but payment history will be maintained on tax statements.

1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family and click on the row to open it. The Family Profile window opens.
3. Click **Archive family** on the right.
4. Click **Continue** to archive the family record.

Restore a Family Record from the Archive

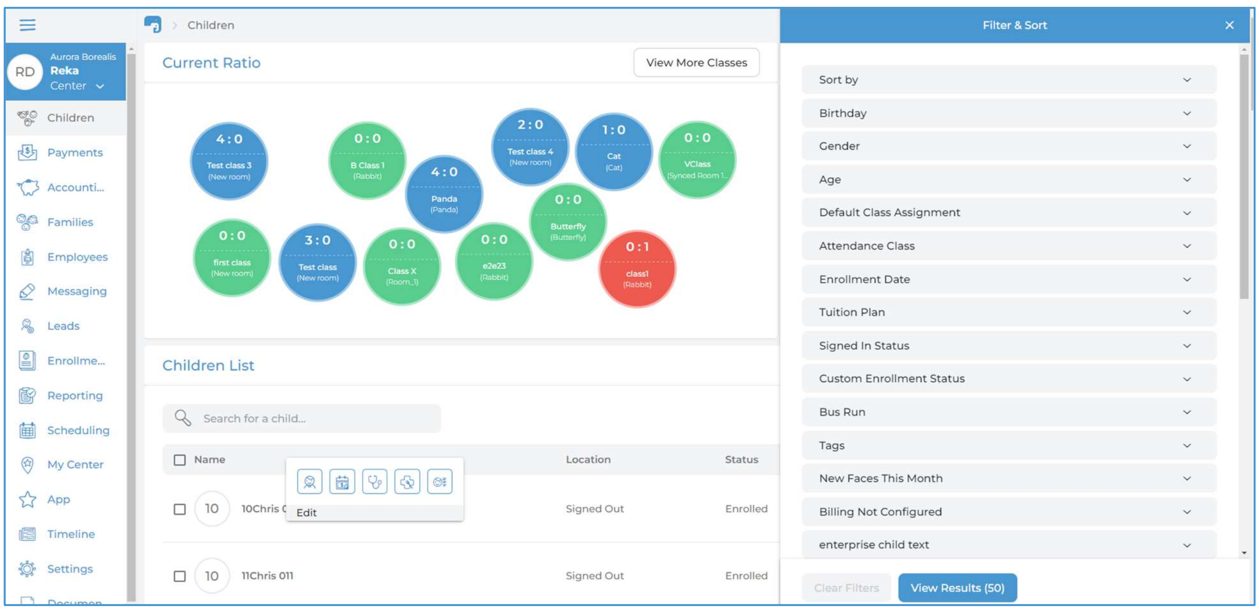
1. Click **My Center** in the left menu.
2. Click **Archive** at the top menu. The Archive window opens.
3. Click **Families** to view a list of archived records.
4. Click **Restore** to the right of the name.
5. Click **Continue** to restore the record.

Children

Search and Sort Children List

1. Click **Children** in the left menu. Your list of children opens.
    a. Enter all or part of a name and click **Enter** on your keyboard to display all matches to your entry.
    b. Click the **Filter & Sort** icon and select a box to filter and sort children in your center
    c. Quick Actions: Hover over a child and click on an icon to navigate to that section of a child's profile. Click the **edit** icon to customize which quick actions you want displayed.

Note: If you are integrating KinderConnect with Smartcare, you will see a KinderConnect view displaying the Sync Status/Date and KinderConnect ID.



Perform Bulk Actions Using Children List

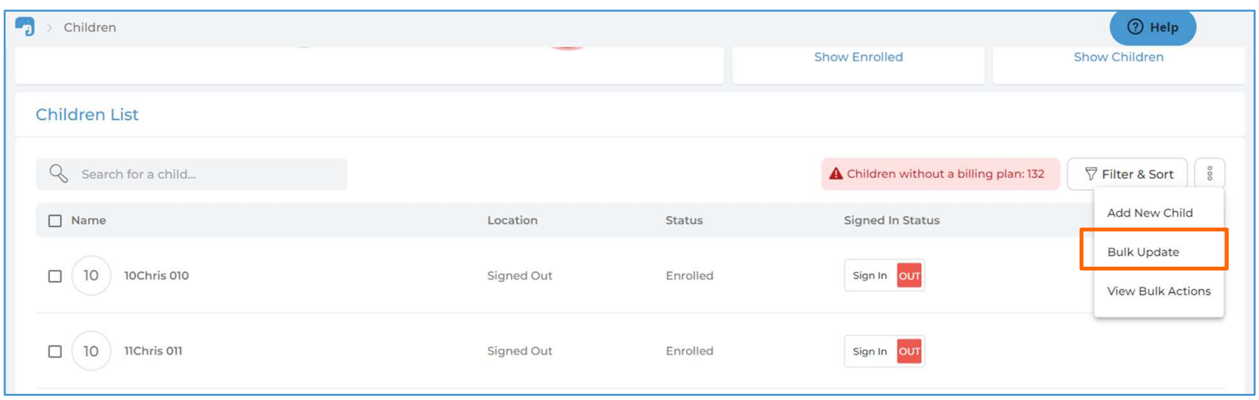
With the Bulk Actions function, you can select multiple children based on specific criteria that you select using filtering and can then perform the following tasks:

- Check In
- Check Out of Class
- Check Out of Center
- Remove a Tuition Plan
- Add a Tuition Plan
- Default Class Assignment
- Move Classes
- Add Charge (including Invoice Now)
- Add Credit
- Update Enrollment Status
- Archive

1. Click **Children** in the left menu. Your list of children opens.
2. Select multiple children by hovering over their names and clicking the selection box.

   Or:

   Click the **filter** icon to the right of the window. Select one or more filters to determine the list of children to be included in the bulk action. Filters selected display next to the filter icon. Click on the **X** to remove a filter if desired.

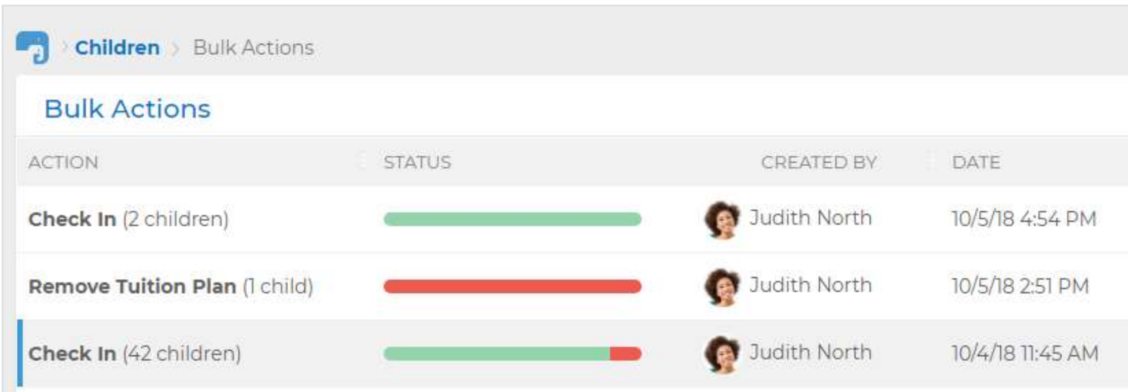


3. Click the three dots next the filter icon and select **Bulk Update**.
4. Select a bulk action from the drop-down menu.
5. Select any additional options and enter any information related to the bulk action.
6. Click **Update Children**.

View Bulk Actions

When actions are performed using the Bulk Actions function, you can view a list of these actions including details such as who performed the bulk action, the date and the status of that bulk action.

1. Click **Children** in the left menu. Your list of children opens.
2. Click the three dots next the filter icon and select **View Bulk Actions**. Your list of bulk actions opens.



   a. A green status bar indicates all actions were successful in the bulk action.
   b. A green and red status bar indicates that some actions were successful and some were not in the bulk action.
   c. A red status bar indicates that all actions were unsuccessful in the bulk action.
   d. Click on a status bar to view additional information about which actions were successful and which failed, if any. Click on the **information** icon to view the reason for the failed action.

Assign a Classroom to a Child

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Profile** box. The Profile window opens.
4. Under Classroom, select a classroom from the drop-down list. See also Set Up Buildings.

Add a Photo to a Child Profile

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Profile** box. The Profile window opens.
4. Click **Add Photo** to upload a photo.

View, Add or Edit Attendance for a Child

If you need to view attendance for a child or add/edit their time in and out, you can do so through the Attendance function. Note that Smartcare will automatically sign out anyone not yet signed out by 11:59pm. See Center Settings to set your own default sign-out time.

If you want to edit the time in/out for multiple children, see Perform Bulk Actions Using Children List.

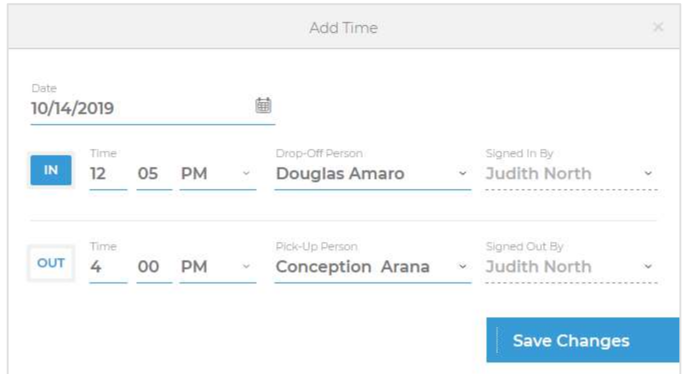
View Attendance

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Attendance** box. The Attendance window opens displaying:
   a. Time in and out
   b. Date
   c. Drop-off and pick-up person
   d. Signed in/out by: This is the name of the parent or employee who physically took the action of signing the child in or out of the center through either the Kiosk, Center Web Portal, Center App (iOS), or Teacher Web Portal.

      Note: When the Signed In/Out By column displays "System," it means the child was signed out by the auto sign-out function. It can be edited to display an actual person.

Add Attendance

1. Click **Add Time** on the Attendance window. The Add Time window opens on the right.
2. Enter the date.
3. Enter the time in and out.
4. Select the drop-off person from the drop-down list.
5. Select the pick-up person, if applicable.
6. The Signed In By field is automatically populated by the employee who is adding attendance.
7. Click **Save Changes**.



Edit Attendance

1. Click on a time slot on the Attendance window. The Edit Time window opens on the right.
2. Make your edits.
3. Click **Save Changes**.

Notes: The Signed In / Out By will not be editable in scenarios where an actual person took the action.

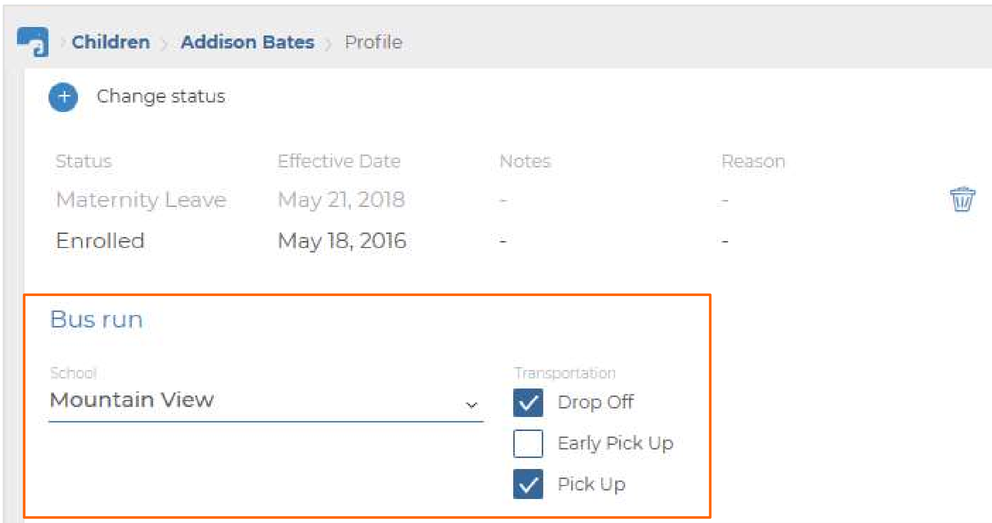
You can adjust the time on closed billing periods for Attendance-Based billing plans. A confirmation pop-up will appear upon saving changes to recommend a charge or credit amount. This suggested amount will not automatically be applied to the account. You will have to manually add this charge or credit to the account if desired.

Assign a School to a Child

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Click the **Profile** box. The Profile window opens.
4. Under Bus Run, select a school from the drop-down list. See also Set Up Schools.

Add Transportation or Bus Run to a Child's Profile

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Click the **Profile** box. The Profile window opens.
4. Under Bus Run, select a school or other location from the drop-down list if one hasn't already been selected. See also Set Up Schools.
5. Under Transportation, select the pick-up and drop-off options that apply.



Add a Food Program to a Child's Profile

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Click the **Profile** box. The Profile window opens.
4. Under USDA Food Program, select a food program from the drop-down list. See also Set Up Meal Plans.
5. Enter the Income Eligibility Form date and the expiration date.

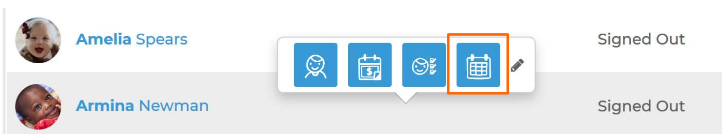
Add a Child's Schedule

With Smartcare Scheduling you can add a one-time or recurring event to a child's schedule. Scheduling can be accessed either through a child's profile or by using the Quick Actions feature in the Children's List.

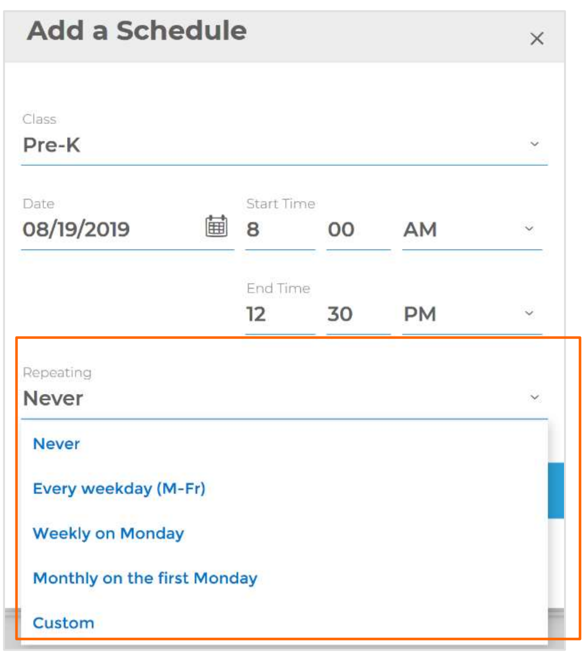
1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Click the **Schedule** box. The Schedule window opens.

   OR

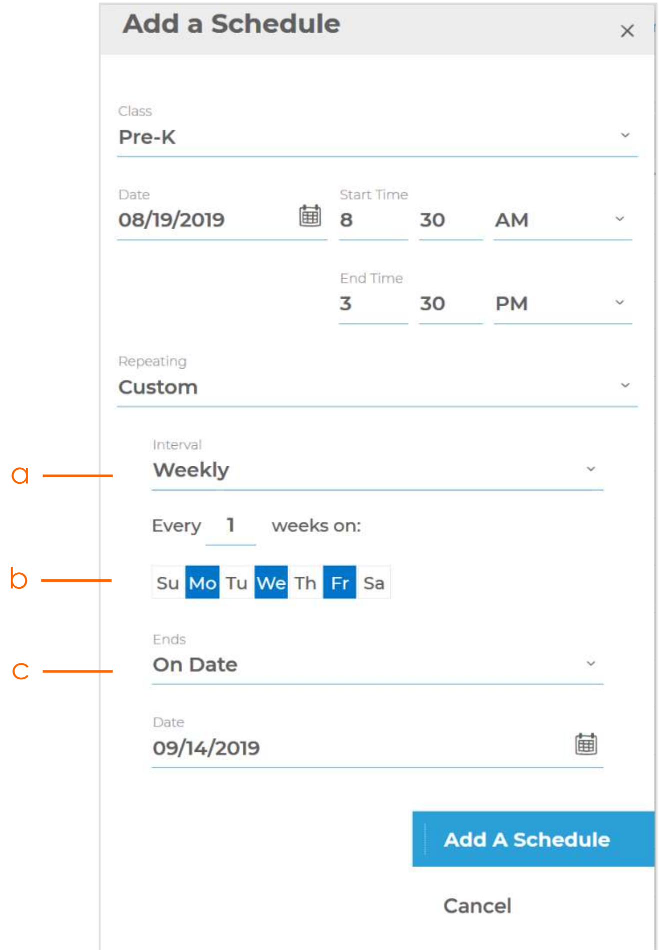
   Hover over a child in the children's list and select the **schedule** icon from the Quick Actions buttons.



4. Click on any current or future date to add a schedule.
5. Select the Class, Date, and Start and End Times.
6. Optional: Select if the schedule repeats and when. See the example on the next page for setting up a custom repeating schedule.



Example of creating a custom repeating schedule:

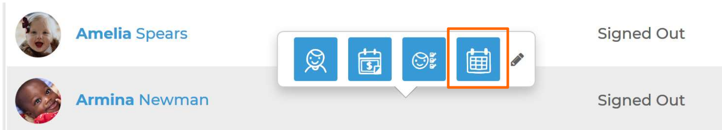


a. Select the frequency: Daily, Weekly, Monthly.
b. Continue to enter the frequency: this could be specific days of the week or a certain day of the month.
c. Select an end date or choose Never to keep the custom schedule indefinitely.

7. Click **Add A Schedule** to save.

Edit a Child's Schedule

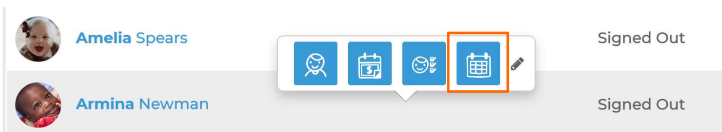
1. Hover over a child in the children's list and select the **schedule** icon from the Quick Actions buttons.



2. Click on the event you want to edit. If the event is recurring, you will be prompted to select just the one event or the entire series.
3. Make your changes and click **Update Event** or **Update Recurrence**.

Delete a Child's Schedule

1. Hover over a child in the children's list and select the **schedule** icon from the Quick Actions buttons.



2. Click on the event you want to delete. If the event is recurring, you will be prompted to select just the one event or the entire series.
3. Click **Delete Event** or **Delete Recurrence**.
4. Click **Delete Event** or **Delete Recurrence** again to confirm.

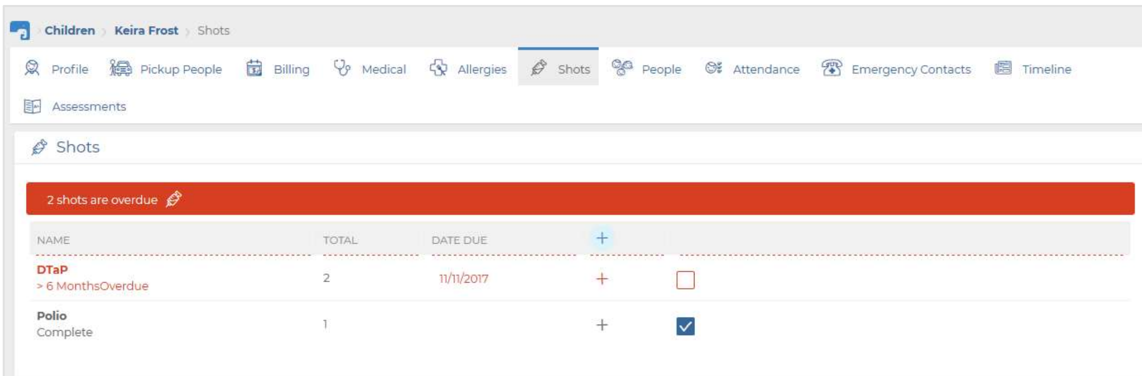
Enter a Child's Medical Information

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Medical** box. The Child Medical Information window opens.
4. Enter the check-up information.
5. Click the three dots in the top right and select **Add new Doctor**.
6. Enter the doctor information and click **Save** when finished.

Enter a Child's Immunizations

Before you can enter immunizations for a child, you must first set them up in your center. See Set Up Immunizations.

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select **Shots** at the top menu. The Shots window opens. Overdue immunizations are prominently displayed with red color-coding.



4. Click a checkbox next to an immunization to enter the new date of immunization. Note that immunizations can be entered in any order (regardless of date) and the system will automatically sort by date once you save the entries.
5. Click on **+** to expand immunization details.

Edit a Child's Immunization

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select **Shots** at the top menu. The Shots window opens.
4. Click the three dots to the right of the immunization and select **Edit**.
5. Make your changes and click **Save Changes**.

Deactivate a Child's Immunization

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select **Shots** at the top menu. The Shots window opens.
4. Click the three dots to the right of the immunization and select **Deactivate**.
5. Select **Continue** to deactivate the immunization.

Enter a Child's Allergies

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Allergies** box. The Allergies window opens.
4. Click the three dots in the top right and select **Add New Allergy**.
5. Enter the allergy information.
6. Enter treatment steps.
7. Enter any notes if desired.
8. Click **Done** when finished.

Select the Child Status on a Child's Profile

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Profile** box. The Profile window opens.
4. Under Child Status, click **Change status**. The Status Change window opens on the right.
5. Select a status from the drop-down list.
6. Select the Effective Date.
7. Enter any notes if desired.
8. Click **Save status change** at the bottom.

Add Emergency Contact

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Emergency Contacts** box. The Emergency Contacts window opens.
4. Click the three dots in the top right and select **Edit emergency contacts**.
5. Click the checkbox next to the adults listed who should be marked as an emergency contact.

Manage Child Notes

Add a Child Note

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Notes** box. The Notes window opens.
4. Click the three dots in the top right and select **Add a Note**.
5. Enter the note and select the date.
6. Click **Add Note** to save.

Note: Notes can only be edited or deleted by the original user who created the Note in the profile.

Edit a Child Note

1. Click the **Notes** box on the child's profile page.
2. Click the note you want to edit.
3. Make your edits and click **Save changes**.

Delete a Child Note

1. Click the **Notes** box on the child's profile page.
2. Click the note you want to delete.
3. Click the three dots in the top right and select **Delete this note**.
4. Click **Yes** to confirm.

Manage Child Documents

Add a Document to a Child's Profile

The following file types can be added to a child's profile under the Documents section: .doc, .docx, .xls, .pdf, .tif, .tiff, .png, .jpeg, .jpg, .gif

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Documents** box. The Documents window opens.
4. Click the three dots in the top right and select **Add a document**. You are then prompted to locate the document on your computer.
5. Enter a File Name if different than the default shown.
6. Enter a note if desired.

7. Click **Upload Document**.

Edit a Document's Name or Notes on a Child's Profile

1. On the child's profile, click the **Documents** box. The Documents window opens.
2. Click on the row of the document you want to edit.
3. Make your changes and click **Save Changes**.

Delete a Document on a Child's Profile

1. On the child's profile, click the **Documents** box. The Documents window opens.
2. Click on the row of the document you want to delete.
3. Click the **trash** icon.

Archive a Child's Record

When you archive a child's record, you must first unenroll them.

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's record opens.
3. Select the **Profile** box. The Profile window opens.
4. Under Enrollment Status, click **Change status**. The Status Change window opens on the right.
5. Select **Unenrolled** from the New Status drop-down list.
6. Select the Effective Date.
7. Select a Reason from the drop-down list.
8. Click **Save status change**.
9. Click the child's name at the top to get back to the main record.
10. Click **Archive child** on the right.
11. Click **Continue** to archive the child record.

Restore a Child Record from the Archive

1. Click **My Center** in the left menu.
2. Click **Archive** at the top menu. The Archive window opens.
3. Click **Children** to view a list of archived records.
4. Click **Restore** to the right of the name.
5. Click **Continue** to restore the record.

Adults

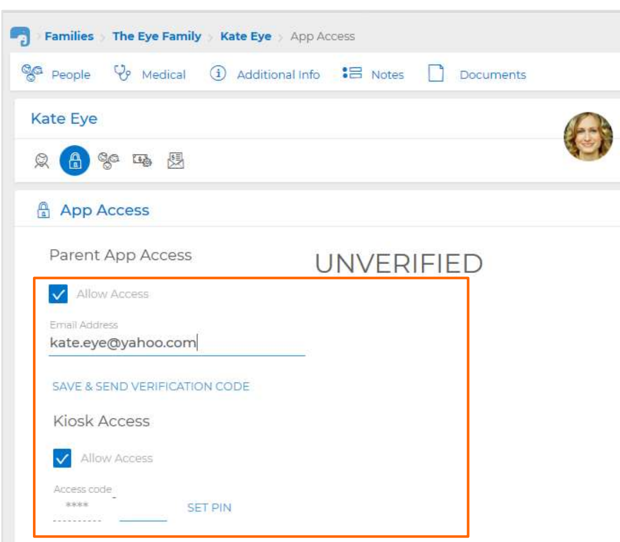
Update Parent / Guardian Email

1. Click **Families** in the left menu. Your list of families opens.
2. Click on a family row. The family profile opens.
3. Click on a parent/guardian.
4. Select the **App Access** box. The App Access window opens.
5. Enter the new email address.
6. Click **Send Verification Code**.

Resend Verification Code to a Parent/Guardian

The Verification Code function is used to verify the user by validating the email address and prompting the user to create their Smartcare email and password for login. Users who have not yet created their login credentials are noted on the App Access screen as "Unverified."

1. Click **Families** in the left menu. Your list of families opens.
2. Click on a family row. The family profile opens.
3. Click on a parent/guardian.
4. Select the **App Access** box. The App Access window opens.
5. Select **Email** from drop-down menu.
6. Click **Send Verification Code**.



Reset Password for a Parent/Guardian

1. Click **Families** in the left menu. Your list of families opens.

2. Click on a family row. The family profile opens.
3. Click on a parent/guardian.
4. Select the **App Access** box. The App Access window opens.
5. Under the email address, click **Send Reset Password Email.**

Reset PIN for a Parent/Guardian

1. Click **Families** in the left menu. Your list of families opens.
2. Click on a family row. The family profile opens.
3. Click on a parent/guardian.
4. Select the **App Access** box. The App Access window opens.
5. Click **Reset PIN.**

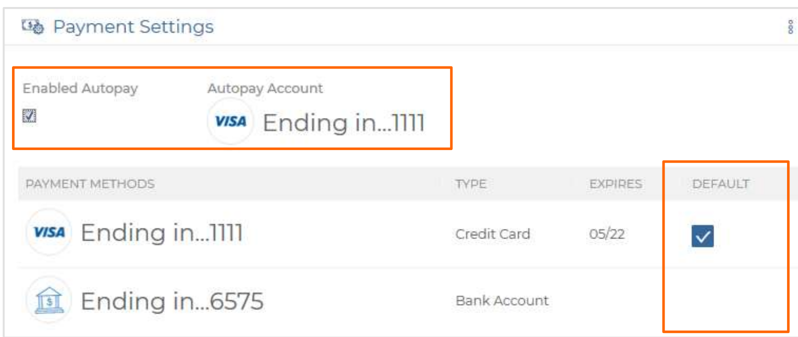
Enter Payment Method For Parent/Guardian

1. Click **Families** in the left menu. Your list of families opens.
2. Click on a family row. The family profile opens.
3. Click on a parent/guardian.
4. Select the **Payment Settings** box. The Payment Settings window opens.
   Note: If you don't see the Payment Settings box, you must first create an account for that person. Click the **Billing** Box and then click **Create Account**.
5. Click the three dots at the top right and select **Add a Payment Method**.
6. Enter the payment information and click **Save Changes** when finished.

Enable Autopay

When you use the Autopay feature, note that whenever a scheduled payment fails, both the center director and the account holder will receive a failed payment email alert. The payment will not be processed again and autopay will be disabled for the account holder until valid payment information is provided.

1. Click **Families** in the left menu. Your list of families opens.
2. Click on a family row. The family profile opens.
3. Click on a parent/guardian.
4. Select the **Payment Settings** box. The Payment Settings window opens.
5. Mark the default payment method by selecting the row under the Default column. The Edit Payment Method prompt displays.
6. Check the box "Use as the default payment method" and click **Save Changes**.
7. Check the "Enabled Autopay" box.



Change Secondary Account Owner to Primary

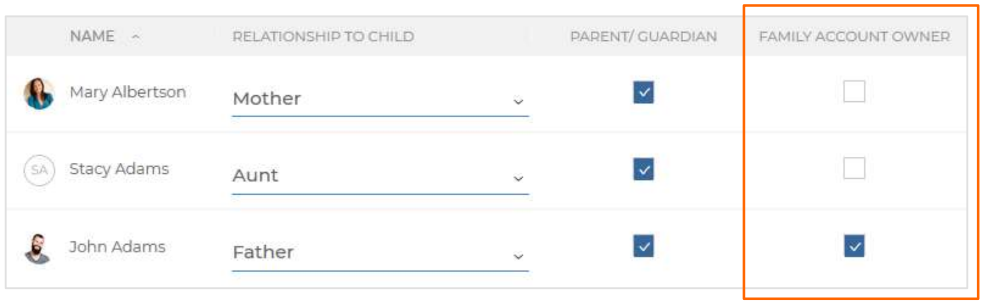
Changing an account owner from secondary to primary is done in multiple steps. You must first remove the secondary account owner assignment and then assign them as the primary account owner. See additional notes provided after the steps below.

Step 1: Remove Secondary Account Owner Assignment

1. Click **Accounting** in the left menu. Your list of families opens.
2. Locate the family in the list and click on it. The Account Balance opens on the right.
3. Click the three dots at the top right and select **Remove the Secondary account owner**.
4. Click **OK** to confirm.

Step 2: Assign the New Primary Account Owner

1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family and click on the name to open the family record.
3. Click the **People** box.
4. Under the Family Account Owner column, check the box for the new primary account owner.



Note: If you have already assigned a tuition plan to the child, you will need to change the account holder on the plan prior to closing the billing account in the next step.

a. Go to the child's profile and click **Billing** box.
b. Click on the Tuition Plan.
c. Click on the **pencil** icon beside the parent name.
d. Click on the Account field and search for the new primary account holder.
e. Click **Save Changes**.

Step 3: Close Previous Primary Account Holder's Billing Account:

1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family and click on the name to open the family record.
3. Click on the person whose account you want to close.
4. Click the **Billing** box.
5. Click the three dots in the top right and select **Close Account**.
6. Click **Yes** to confirm.

Notes and Recommendations

- If desired, you can now assign the previous primary account holder to secondary. To do this, you must first close that person's account. An account can only be closed as long as they have a zero balance. See Close a Billing Account. If there is a negative balance on the account (credit), you can transfer that as a credit to the new primary account holder. If there is an outstanding balance, it will need to be added to the new primary account holder as a manual charge.
- Please note that once the billing account has been closed, any historical billing data will be lost, and therefore a best practice is to re-send the statements to the former primary account owner.
- The Payments by Payer report and the Standard Customer Statement report are also helpful documents to send to the former primary account holder.
- A parent can also log into the Smartcare Parent Web Portal to print their statements from the Billing section.

Manage Adult Notes

Add a Note to an Adult's Profile

1. Click **Families** in the left menu. Your list of families opens.
2. Select a family from the list. The family's record opens.
3. Click on the adult where you want to add a note.
4. Select the **Notes** tab at the top. The Notes window opens.
5. Click the three dots in the top right and select **Add a Note**.
6. Enter the note and select the date.
7. Click **Add Note** to save.

Note: Notes can only be edited or deleted by the original user who created the Note in the profile.

Edit an Adult Note

1. Click the **Notes** tab at the top of the adult's profile page.
2. Click the note you want to edit.
3. Make your edits and click **Save changes**.

Delete an Adult Note

1. Click the **Notes** tab at the top of the adult's profile page.
2. Click the note you want to delete.
3. Click the three dots in the top right and select **Delete this note**.
4. Click **Yes** to confirm.

Manage Adult Documents

Add a Document to an Adult's Profile

The following file types can be added to an adult's profile under the Documents section: .doc, .docx, .xls, .pdf, .tif, .tiff, .png, .jpeg, .jpg, .gif

1. Click **Families** in the left menu. Your list of families opens.
2. Select a family from the list. The family's record opens.
3. Click on the adult where you want to add a document.
4. Select the **Documents** tab at the top. The Documents window opens.
5. Click the three dots in the top right and select **Add a document**. You are then prompted to locate the document on your computer.
6. Enter a File Name if different than the default shown.
7. Enter a note if desired.
8. Click **Upload Document**.

Edit a Document's Name or Notes on an Adult's Profile

1. On the adult's profile, click the **Documents** tab at the top. The Documents window opens.
2. Click on the row of the document you want to edit.
3. Make your changes and click **Save Changes**.

Delete a Document on an Adult's Profile

1. On the adult's profile, click the **Documents** tab at the top. The Documents window opens.
2. Click on the row of the document you want to delete.
3. Click the **trash** icon.

Archive an Adult's Record

1. Click **Families** in the left menu. Your list of families opens.
2. Locate the family and click on the row to open it. The Family Profile window opens.
3. Click on the adult you want to archive.
4. Click **Archive** on the right.
5. Click **Continue** to archive the adult's record.

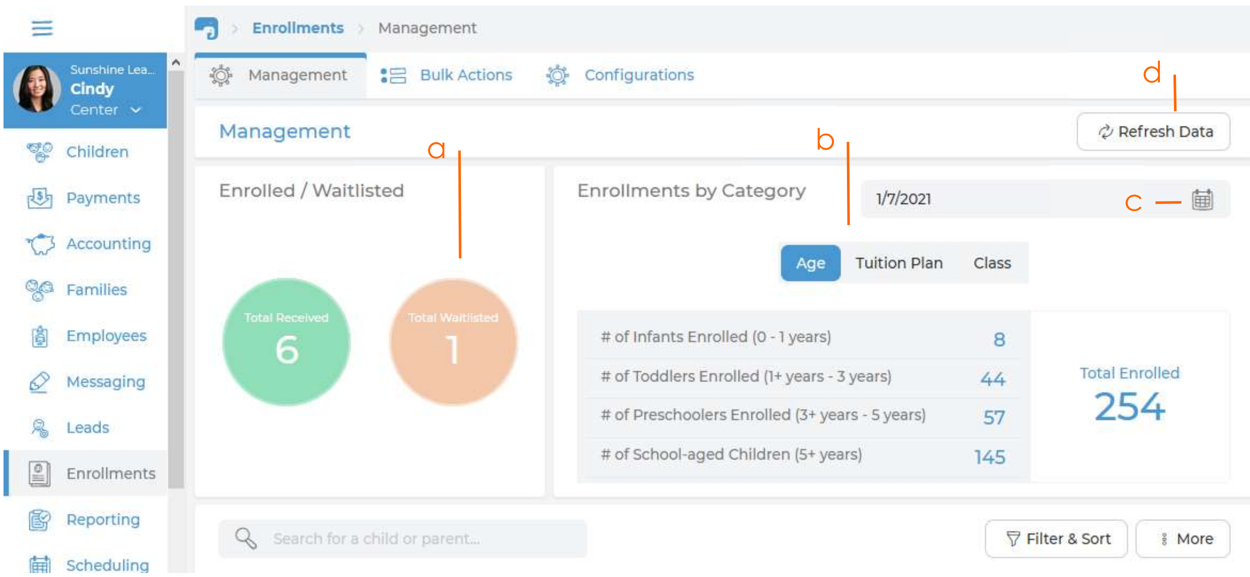
Restore an Adult Record from the Archive

1. Click **My Center** in the left menu.
2. Click **Archive** at the top menu. The Archive window opens.
3. Click **Adults** to view a list of archived records.
4. Click **Restore** to the right of the name.
5. Click **Continue** to restore the record.

Enrollments

Enrollments Dashboard

The Enrollments dashboard provides a visual snapshot of your current enrollments. To view, click **Enrollments** in the left menu.



a. Displays the number of received enrollments versus waitlisted.

b. Select a category to view enrollment data by Age, Tuition Plan, or Class.

c. Click the **calendar** icon to select an "As of" date.

d. Click **Refresh Data** to view the most current enrollment information.

Configure Online Enrollment

You can configure multiple online enrollments. For example, you may want to configure re-enrollments for separate centers under the same organization or to create different enrollment links (such as enrichment programs). The option to configure online enrollments must be enabled by your enterprise account admin.

Once you configure an online enrollment, you can then set the enrollment capacity to ensure your center does not exceed the capacity for each tuition plan. See Set Enrollment Capacity.

Add New Enrollment Configuration

1. Click **Enrollments** in the left menu. The Enrollments window opens.
2. Click **Configurations** at the top menu.
3. Click More on the right and select **Add New Configuration**.
4. Enter a name for the enrollment.
5. Add a URL address. This is the link where parents can enroll online.
6. Select a Start Date (and End Date if applicable).
7. Click **Continue**.
8. Select each category to configure the online enrollment. See below.

Settings

In this step, enter the URL address for your enrollment. Smartcare generates a URL by default, however you can customize it. This is the URL you send out or post publicly for people to enroll.

1. Enter a name, without any spaces, for your URL.
2. Enter an email address, phone number and your center's director's name.

   To copy the URL, click the **clipboard** icon next to the URL.
3. Select additional enrollment options:
   a. **Automatically Enroll Children:** Automatically sets a child's status as enrolled when the online enrollment is completed.
   b. **Send parents confirmation email:** Automatically sends the parent a confirmation email upon enrollment.
   c. **Grant parent/guardian access to Parent App:** Automatically gives the parent access to the Parent App once enrollment is complete.
   d. **Grant parent/guardian access to Kiosk:** Automatically gives the parent access to the Kiosk once enrollment is complete.
   e. **Receive email notifications:** Automatically sends you an email notification every time a parent completes the online enrollment form.
   f. **Add child age restriction:** Limits child eligibility age. If a child does not meet the age requirement, the parent cannot add the child to the registration.
   g. **Allow only children currently existing in the center:** Limits registration to only those children currently in the center.
4. Click **Save Tab** when finished making selections.

Parent Info

Required fields for enrollment are listed and greyed out. Optional fields for the enrollment form are listed. To make an item required, check the box next to it:

- Cell phone number
- Address
- Additional Info: You can add any custom fields to the enrollment form that have been created for your center. See Create a Custom Field.

1. Click **Save Tab** when finished making selections.

Child Info

Required fields for enrollment are listed and greyed out. Optional fields for the enrollment form are listed. To make an item required, check the box next to it:

- Ethnicity
- Emergency Contacts: When checked, requires a parent to add a minimum number of emergency contacts on the enrollment form to comply with any regulations and procedures in your center. Note that the minimum number required is in addition to primary guardians or account owners.
- Medical Information: When checked, requires a parent to add at least one doctor and to complete all medical information including allergies, medical insurance, and policy.
- Pick-up People: When checked, requires a parent to add at least one pick-up person.
- Additional Info: You can add any custom fields to the enrollment form that have been created for your center. See Create a Custom Field.

Note: A parent re-enrolling a child will see emergency contacts and pick-up people pre-populated in the enrollment form with the option to update the information.

Add a Tuition Plan

You can add one or more tuition plans to display on the form for selection during the enrollment process.

1. Click **Add Tuition Plan**.
    a. Select a Tuition Plan from the drop-down menu.
    b. Enter a name as you want it to display on the form.
    c. Select a start date and end date.
    d. Click **Add Tuition Plan**.
2. Click **Save Tab** when finished making selections.

Acknowledgements

Embed any custom acknowledgements, authorizations, confirmations, policies, or terms of service that you need parents to review, sign, or initial using your own custom verbiage. Check any items that you want included in the form.

Add Acknowledgement

1. Click **Add Acknowledgement**.
    a. Enter a name for the Acknowledgement.
    b. Select the type from the drop-down menu.
    c. Enter the text.
    d. If a parent's initial is required, check the Require box.
2. Click **Save Tab** when finished making selections.

Documents

Include any forms or documents as part of the enrollment, such as a parent handbook, privacy document or terms of agreement. Forms are read-only and cannot be filled out online.

1. Locate the document on your computer and drag and drop it into the space provided. Or click the **Browse your files** button to search for it.
2. If a parent's signature is required, check the Require parent signature box.
3. Click **Save Tab** when finished making selections.

Payments

In the final step, select payment options for enrollees to complete.

If you choose to accept a registration or deposit fee during enrollment, you also have the following options:

- For families with more than one child registering, you can set a maximum registration fee.
- You can offer a registration or deposit discount based on the response to a custom question. The discount will then automatically be applied upon enrollment.

Capture Auto-Pay Information

1. Click the **Capture auto-pay information** box. Information for auto-pay will be captured during the registration process.

Add Deposit or Registration Fee

1. Click the **Add deposit / registration fee** box.
    a. Select the fee type from the drop-down menu.
    b. Select the accounting code from the drop-down menu.
    c. Enter the amount.
    d. Enter the fee name as you want it to display on the form.
    e. Enter a maximum fee for families enrolling more than one child.
2. Click **Save Tab** when finished making selections.

Set Up Custom Question Discounts

1. Click the **Set up custom question discounts** box.
    a. Enter a question for the discount. For example, "Are you an employee of Sunshine Learning Center?"
    b. Enter two or more responses and add the discount percentage for each. For example, add "Yes" and enter a 10% discount, add "No" and enter a 0% discount.
    c. Add another custom discount question if desired by clicking **Add deposit/registration fee**.
    d. Click **Save Tab** when finished making selections.

Set Enrollment Capacity

For each online enrollment configuration, you can set the enrollment capacity to ensure your center does not exceed the capacity for a tuition plan. Capacities are calculated to include both online and manual enrollments.

Add an Enrollment Capacity

1. Click **My Center** in the left menu. The Center Information window opens.
2. Click **Enrollment Capacity** at the top menu.
3. Click **Add New Capacity**.
4. Select a tuition plan from the dropdown menu.
5. Select the capacity requirements:
    a. **Set a capacity for this tuition plan**: Enter the number not to be exceeded.
    b. **Link this tuition plan to an existing capacity**: Select an existing capacity (tuition plan) from the dropdown menu to combine the number not to be exceeded. For example, if Tuition Plan A and Tuition Plan B are linked, and Tuition Plan A receives an enrollment, then one spot will be deducted from Tuition Plan B.
    Note: The option to link an existing capacity appears after the first capacity is added.
6. Click **Add Tuition Plan**.

Delete an Enrollment Capacity

1. Click **My Center** in the left menu. The Center Information window opens.
2. Click **Enrollment Capacity** at the top menu.
3. Hover over a Tuition Plan in the list of Capacity Settings and click **Delete** on the right.
4. Click **Delete** to confirm.

Send Enrollment Invitation

1. Click **Enrollments** in the left menu. The Enrollments window opens.
2. Click **Enrollment Configuration** at the top menu.
3. Click the **clipboard** icon to the right of the URL Code to copy and paste it into any online communication. When a person clicks the enrollment link, they will be guided through the online enrollment process for your center.

Change Enrollment Status

Once a parent completes online enrollment, they are listed under Enrollment Management with an application status.

1. Click **Enrollments** in the left menu. The Enrollments window opens.
2. Select the enrollment status to the right of the enrollee's name. You can also use the Bulk Action function for multiple enrollees.

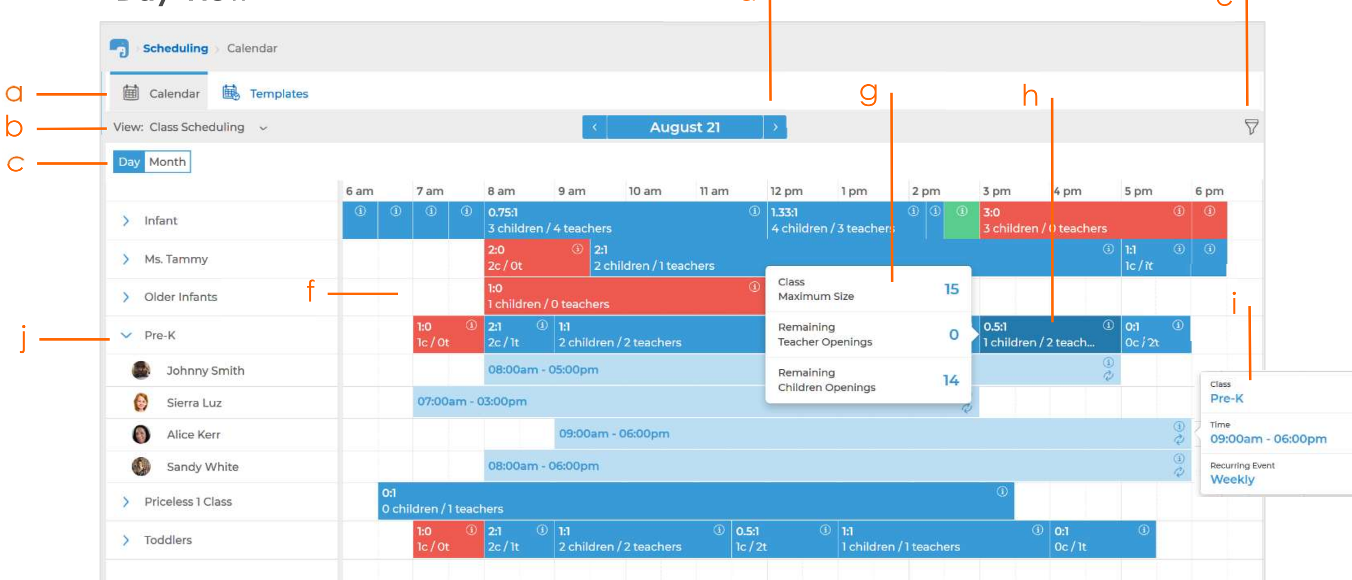
Scheduling

View Schedule

Through Smartcare's Scheduling feature you can view your center's schedule for teachers and children, as well as add, edit, delete schedules, view class details, and create schedule templates.

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Click on a day to view the schedule details for the day.

Day View



a. Click Calendar to view your center's schedule or click Templates to create schedule templates for bulk scheduling.

b. View all class schedules or select Children Only or Teachers Only.

c. View the schedules for the day or for the entire month.

d. Click the forward and backward arrows to navigate between months.

e. Click the **filter** icon to filter the schedules by class.

f. Color-coding:

   Red – The ratio for that class is out of balance for at least some part of the day.

   Blue – The class is at ratio but there's opportunity to add more children to the class if desired.

Green – The class is at your desired ratio.

g. Hover over the class row to view a breakdown of the ratios for the class.

h. Click on a class row to view the schedules for that class.

i. Hover over a schedule to view the class, time, and if the event is recurring. Click on the event to edit or delete (see below). An event that is greyed out cannot be edited because it is either a past or current event.

j. Click on the class name to see the list of children and teachers (listed last).

Add a Schedule

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.

   For Children

   a. Select Children Only under the View drop-down menu.

   b. Click the three dots at the top right and select **Add Schedule**.

   For Teachers

   a. Select Teachers Only under the View drop-down menu.

   b. Click the three dots at the top right and select **Add Schedule**.

2. Complete the details and click **Add Schedule** to save. See also Add a Child's Schedule or Add an Employee Schedule.

Edit a Schedule

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Locate the event and click on it. If the event is recurring, you will be prompted to select just the one event or the entire series.
3. Make your changes and click **Update Event** or **Update Recurrence**.

Delete a Schedule

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Locate the event and click on it. If the event is recurring, you will be prompted to select just the one event or the entire series.
3. Click **Delete Event** or **Delete Recurrence**.
4. Click **Delete Event** or **Delete Recurrence** again to confirm.

Scheduling Templates

Scheduling Templates enables you to create custom schedules for bulk scheduling.

Add a Schedule Template

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Click the Templates tab.
3. Click the three dots at the top right and select **Add a scheduling template**. By default the template is marked Active. Click the Active box to uncheck it if you'd like to create a template but are not ready to actively use it.
4. Enter a title for the template.
5. Select if the template is for a teacher or children schedule.
6. Select the class, days, and start and end times.
7. Click **Save changes**.

Add Children to a Schedule Template

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Click the Templates tab.
3. Click the three dots to the right of the children template you want to use and select **Add/Edit children**.
4. Select a child from the drop-down menu in the Children field, or scroll through the list and select multiple children as desired.
5. Click **Update Assigned Children**. The child or children are added to the template list. Click the **X** to delete a child from the bulk selection.
6. Click **Save Changes**.

Add Employees to a Schedule Template

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Click the Templates tab.
3. Click the three dots to the right of the employee template you want to use and select Add/Edit employees.
4. Select an employee from the drop-down menu.
5. Click **Add another employee** to select additional employees. Click the **trash** icon to delete an employee from the bulk selection.
6. Select the position (only active positions for the employee will be available for selection).
7. Select the type of event: Regular Hours, Time Off, Sick/Doctor.
8. Optional: Select the length of a break, if desired.
9. Click **Save Details**.

Edit a Schedule Template

1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Click the Templates tab.
3. Click the three dots to the right of the template you want to use and select Add/Edit children or Add/Edit employees.
4. Make your changes and click **Save Changes** or **Save Details**.

Delete a Schedule Template

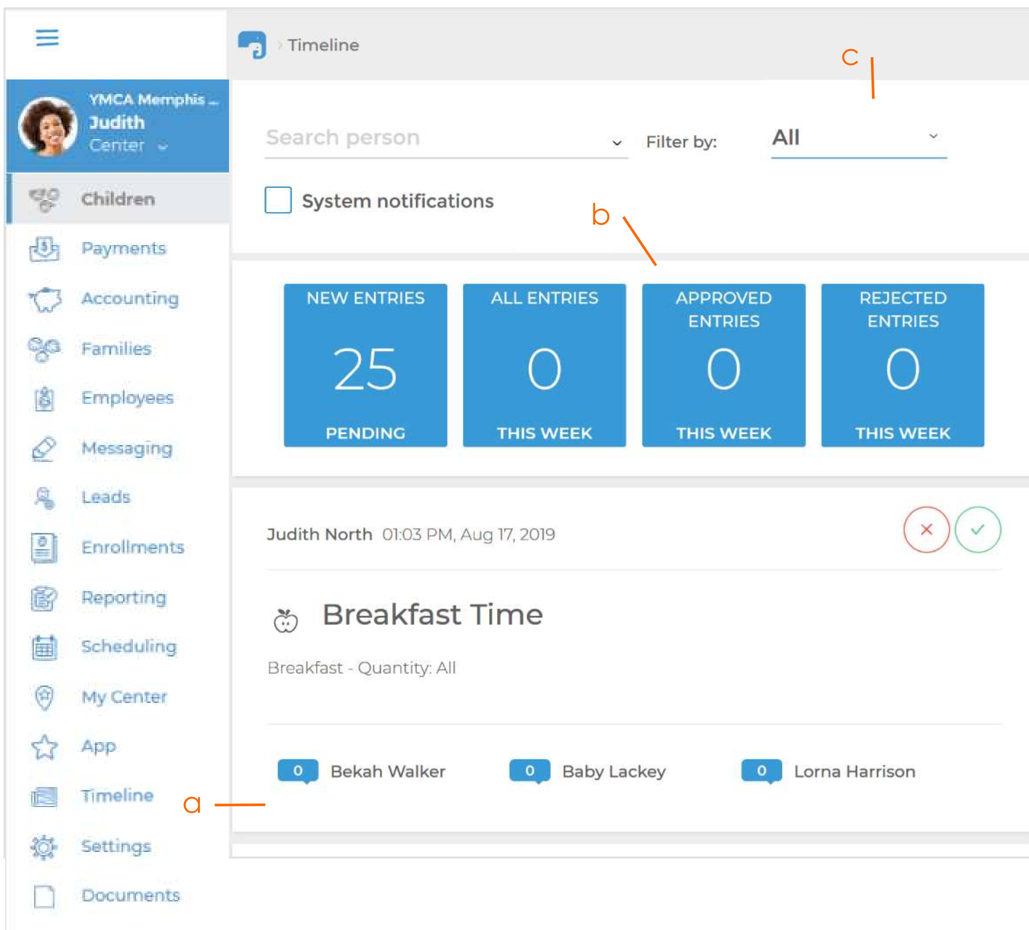
1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Click the Templates tab.
3. Click on the row of the template you want to delete. The template side bar opens.
4. Click the three dots at the top right and select **Delete Scheduling Template**.

Timeline

Through the Timeline feature, you can track notes, meals, incidents and other daily activities of your children and providers. Timeline entries are communicated with each child's parents. Timeline activity is entered by providers through the Teacher Web App.

View the Timeline

1. Click **Timeline** in the left menu. The Timeline window opens.



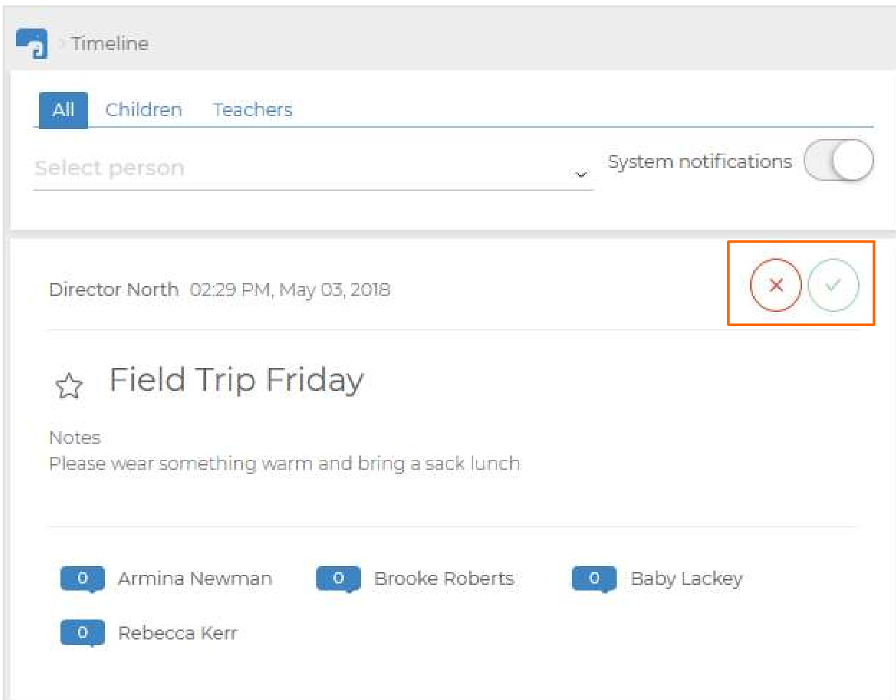
   a. Scroll to view all entries.

   b. Click on a box to refine the entries displayed in the timeline.

   c. Click Children or Teachers to view separate timelines for children and teachers.

Approve or Reject a Timeline Entry

1. Click **Timeline** in the left menu. The Timeline window opens.
2. Click the first box "New Entries Pending." A list of entries for your review opens.
3. Click the check mark to approve or the X to reject it.



Messaging

Smartcare's messaging system enables you to send both emails and text messages to parents or staff.

Send a Message To Specific Individuals

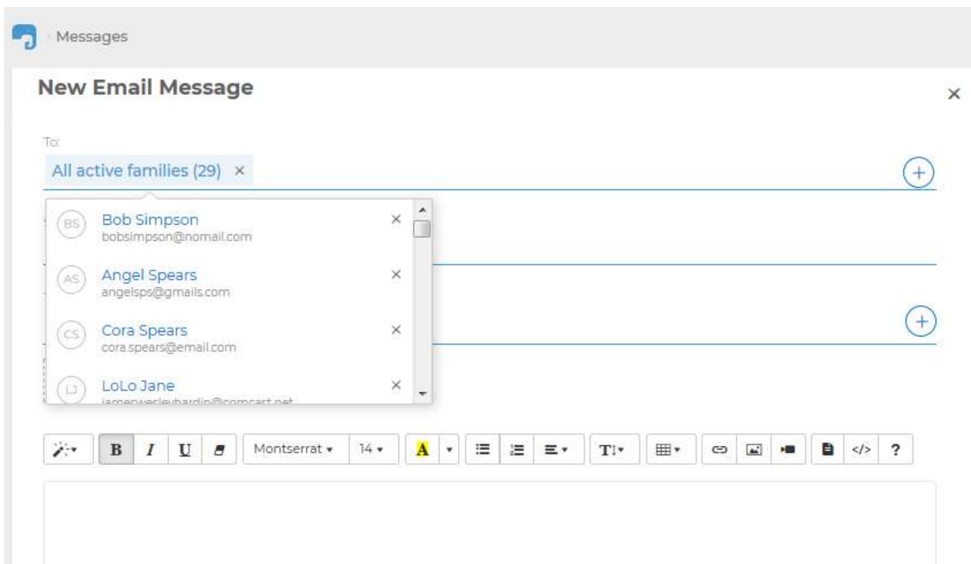
1. Click **Messaging** in the left menu. The Messages window opens.
2. Click the three dots at the top right and select **Send email**.
3. In the To field, begin typing the name of the recipient. When the name comes up, click on it to add. Repeat to include additional recipients.
4. Enter a subject.
5. Click **Drop file or click to browse** to add an image or document if desired.
6. Enter the message. Click on the formatting tools to create headers, bullet lists, and insert links and images.

7. Use Merge Fields to add personalization or specific information to your message if desired.
8. Click **Preview email** to view it before sending or click **Send email to all recipients** when finished.

Send a Message to a Group

1. Click **Messaging** in the left menu. The Messages window opens.
2. Click the three dots at the top right and select **Send email**.
3. Click the **plus** icon to the right of the To field to select the recipients.
4. Click the drop-down arrows to select the filters to apply to the group of recipients. Click the X at the top right when finished selecting.

   Click on a group in the To field to review the recipient list if desired. Click on the X next to a name to remove it from the list.



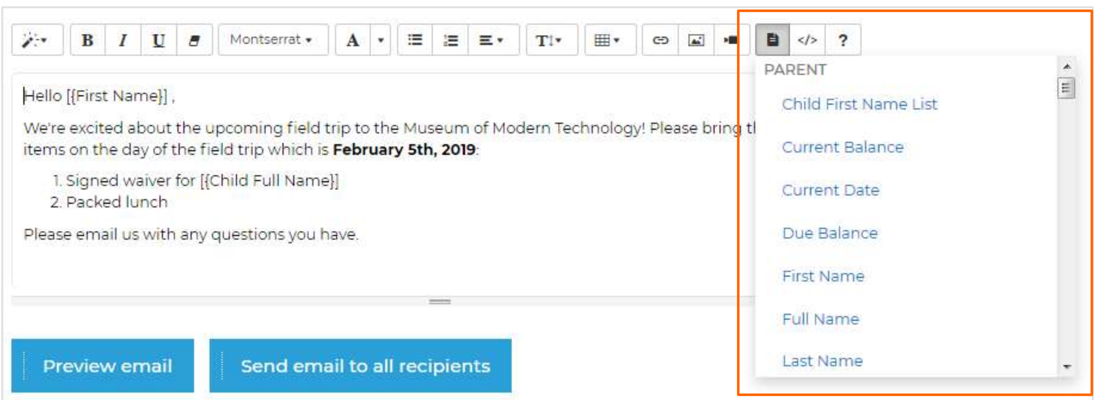
5. Enter a subject.
6. Click **Drop file or click to browse** to add an image or document if desired.
7. Enter the message. Click on the formatting tools to create headers, bullet lists, and insert links and images.

8. Use Merge Fields to add personalization or specific information to bulk messages if desired.
9. Click **Preview email** to view it before sending or click **Send email to all recipients** when finished.

Use Merge Fields in Messaging

Merge fields can be used to add personalization or specific information to bulk messages such as the first name of a parent or employee, a balance due, or even custom fields that you have set up.

1. On the Messaging window, enter your message in the email body.
2. Use your mouse to place your cursor at the point where you want to insert a merge field.
3. Click the **Merge Fields** icon and select a field from the list to insert it. Be sure to leave the merge field as-is without modifying the brackets displayed. You can click **Preview email** to confirm how the merge field will look.



Send a Text Message To Specific Individuals

You can send a text message to specific individuals through the Center Web Portal.

When you send a text, note that there is a fee and your center will be invoiced for text messaging along with your Smartcare subscription. The fee schedule for sending text messages is as follows:

- Less than 160 characters = $.04 per recipient
- Less than 320 characters and greater than 160 characters = $.08 per recipient
- Greater than 320 characters and less than 480 characters = $.12 per recipient

1. Click **Messaging** in the left menu. The Messages window opens.
2. Click the three dots at the top right and select **Send SMS (text)**.
3. In the To field, begin typing the name of the recipient. When the name comes up, click on it to add. Repeat to include additional recipients.
4. Type your message in the Message field. A character count displays in the lower left corner of the message field, and the cost per recipient is displayed in the lower right corner. The cost will adjust based on the fee schedule above.
5. Click **Send Message**. The SMS (text) Fees/Terms message displays. Click **Accept And Send**.

Send a Text Message to a Group

You can send a text message to groups of people and filter by employees, families and leads.

When you send a text, note that there is a fee and your center will be invoiced for text messaging along with your Smartcare subscription. The fee schedule for sending text messages is as follows:

- Less than 160 characters = $.04 per recipient
- Less than 320 characters and greater than 160 characters = $.08 per recipient
- Greater than 320 characters and less than 480 characters = $.12 per recipient

1. Click **Messaging** in the left menu. The Messages window opens.
2. Click the three dots at the top right and select **Send SMS (text)**.
3. Click the **plus** icon to the right of the To field to select the recipients.
4. Click the drop-down arrows to select the filters to apply to the group of recipients. Click the X at the top right when finished selecting.

   Click on a group in the To field to review the recipient list if desired. Click on the X next to a name to remove it from the list.
5. Type your message in the Message field. A character count displays in the lower left corner of the message field, and the cost per recipient is displayed in the lower right corner. The cost will adjust based on the fee schedule above.
6. Click **Send Message**. The SMS (text) Fees/Terms message displays. Click **Accept And Send**.

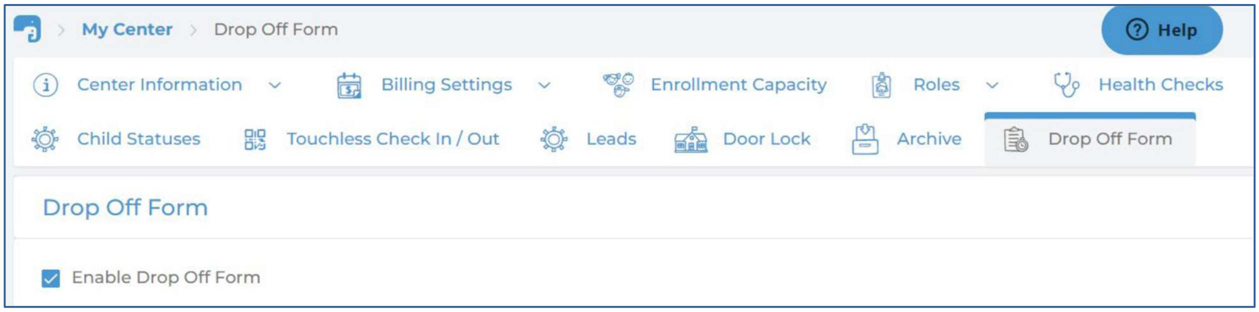
View Sent Text Messages

1. Click **Messaging** in the left menu. The Messages window opens.
2. Click the **SMS (text)** tab at the top. A list of sent text messages is displayed.
3. Click on a message to view details.

Drop Off Form

Activate Drop Off Form

My Center > Drop Off Form > Enable Drop Off Form

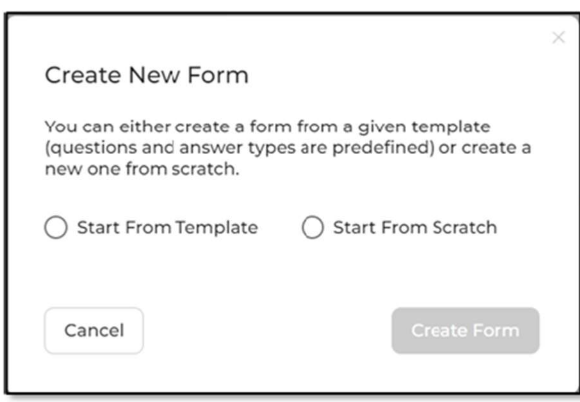


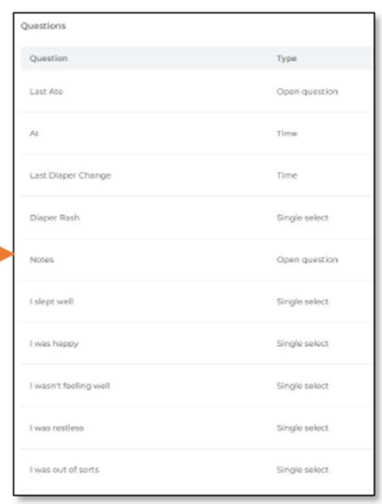
Note that a form can have multiple classes linked to it, but a class can have only one form assigned to it. If you are not able to link a class, it is due to that class already having a drop off form assigned.

Use a Default Form

Smartcare offers a default Drop Off Form template. The default form includes 10 questions best used for infant classes. Once selected, it can be linked to specific classes. The template can be modified but must be named differently once changed.

My Center > Drop Off Form > Add New Form > Start From Template > Create Form > Select class(es)

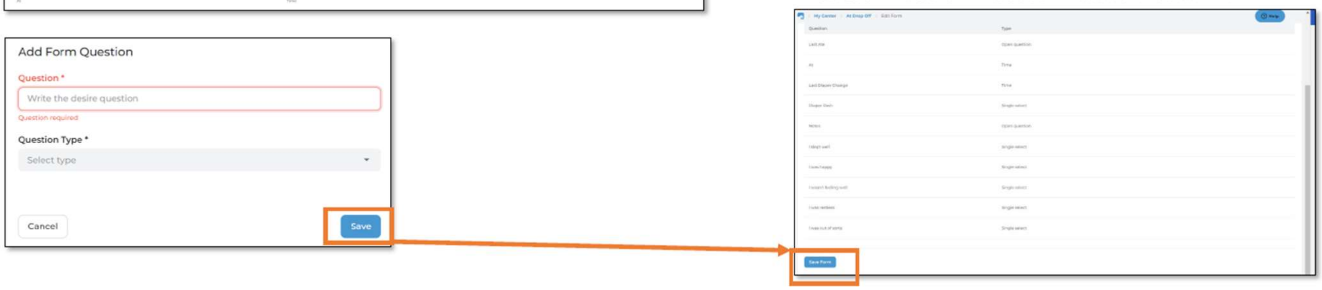




Edit an Existing Form

My Center > Drop Off Form > Click on the existing form > Click on “Add Question” button or click on an existing question to edit or delete

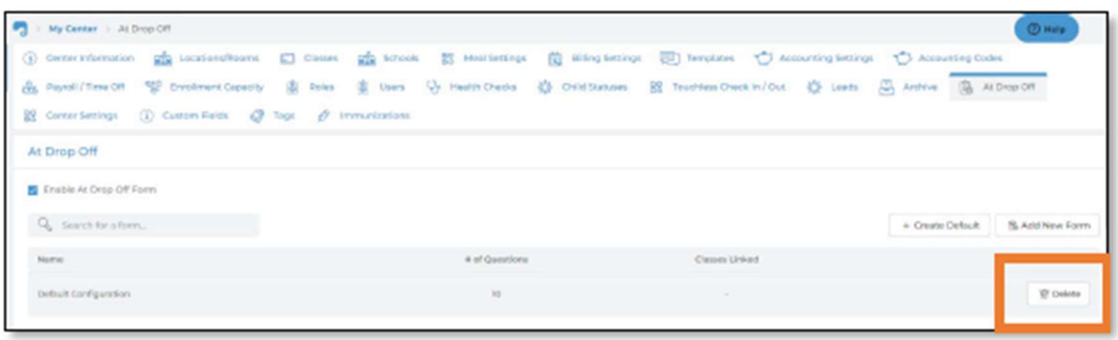
Click >>Save<< then >>Save Form<<.



Click >>Save<< then >>Save Form<<

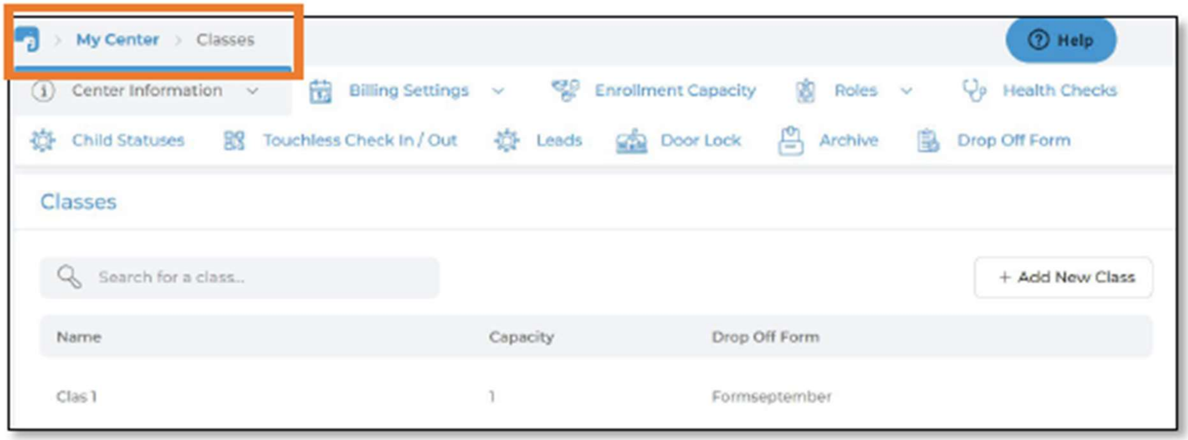
Delete a Form

My Center > Drop Off Form > Select a Form > Delete



See linked Classes

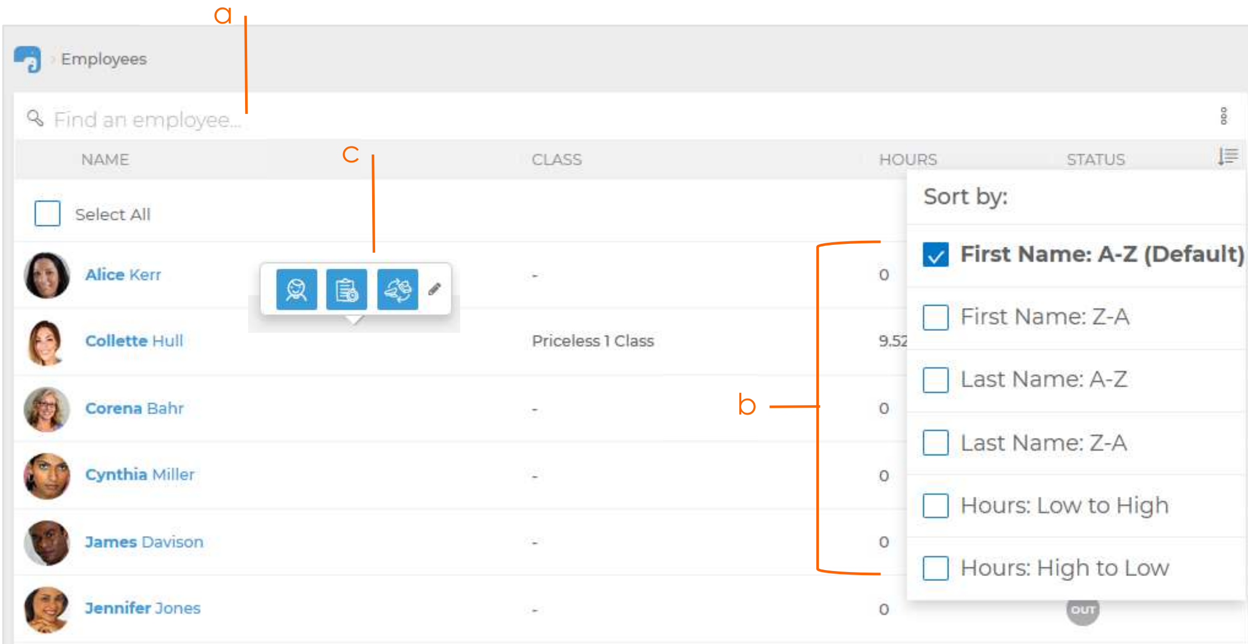
To see if a class is linked to a form, go to My Center > Classes:



Manage Employees

Search and Sort Employee List

1. Click **Employees** in the left menu. Your list of employees opens.
    a. Enter all or part of a name and click **Enter** on your keyboard to display all matches to your entry.
    b. Click on the **filter** icon to view and select sorting options.
    c. Quick Actions: Hover over an employee and click on an icon to navigate to that section of an employee's profile. Click the **edit** icon to customize which quick actions you want displayed.



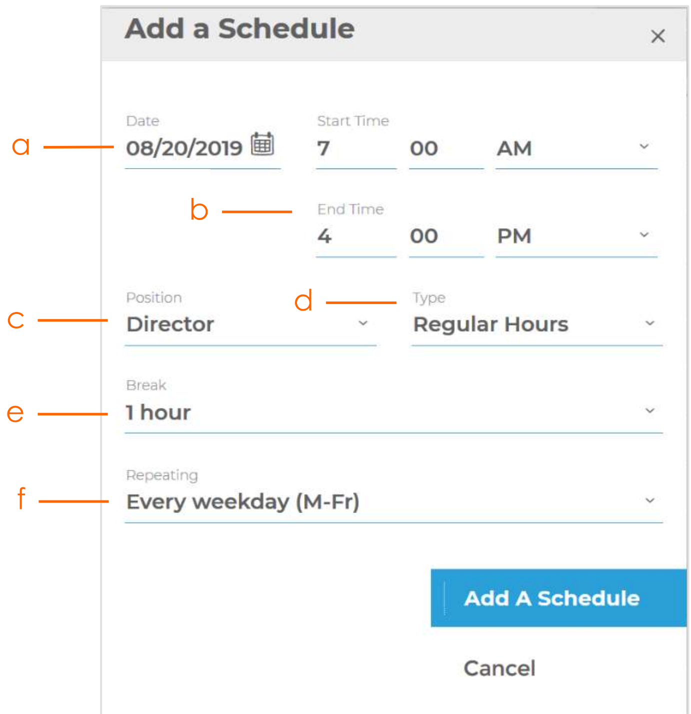
Note: It is important that you do not edit, delete or archive the Smartcare Admin in your employee list. The Smartcare Admin is necessary for Smartcare support agents and account managers to assist you when you have questions about your account. The Smartcare Admin "employee" will look something like this:

Add an Employee

1. Click **Employees** in the left menu. Your list of employees opens.
2. Click the three dots at the top right and select **Add New Employee**.
3. Enter the employee information.
4. Select the User Role from the drop-down list. Note that a teacher must have a Teacher user role in order to be able to log in to the Teacher Web Portal. See also Set Up User Roles.
5. Click **Add Employee**.

Add an Employee Schedule

1. Click **Employees** in the left menu. Your list of employees opens.
2. Click on the employee record to open it.
3. Click the **Scheduling** box.
4. Click on any current or future date to add a schedule.



   a. Select the start date.
   b. Select the start and end times.
   c. Select the position (only active positions for the employee will be available for selection).
   d. Select the type of event: Regular Hours, Time Off, Sick/Doctor.
   e. Optional: Select the length of a break, if desired.
   f. Select if the schedule repeats and when. See the example under Add a Child's Schedule.

5. Click **Add A Schedule** to save.

Edit an Employee Schedule

1. Click **Employees** in the left menu. Your list of employees opens.
2. Click on the employee record to open it.
3. Click the **Scheduling** box.
4. Click on the event you want to edit. If the event is recurring, you will be prompted to select just the one event or the entire series.
5. Make your changes and click **Update Event** or **Update Recurrence**.

Delete an Employee Schedule

1. Click **Employees** in the left menu. Your list of employees opens.
2. Click on the employee record to open it.
3. Click the **Scheduling** box.
4. Click on the event you want to delete. If the event is recurring, you will be prompted to select just the one event or the entire series.
5. Click **Delete Event** or **Delete Recurrence**.
6. Click **Delete Event** or **Delete Recurrence** again to confirm.

Add or Change a User Role on an Employee Record

1. Click **Employees** in the left menu. Your list of employees opens.
2. Click on the employee record to open it.
3. Click the **User Role** box.
4. Select the user role from the Smartcare User Role drop-down list. See also Set Up User Roles.
5. Click **Set Role**.

Add a Position to an Employee Record

1. Click **Employees** in the left menu. Your list of employees opens.
2. Click on the employee record to open it.
3. Click the **Positions** box.
4. Click the three dots at the top right and select Add Employee Position.
5. Select the Employee Position from the drop-down list.
6. Select the compensation status: Hourly or Salary.
7. Select the employment Type from the drop-down list.
8. Enter the compensation rate for hourly or an annual salary.
9. Select the Start Date (and End Date of applicable).
10. Check the "Active" box if this position is currently active.
11. Enter the maximum and minimum hours required per week.
12. Enter a Custom ID if desired.
13. Select the Class assignment.
14. Click **Add Employee Position**.

Add Medical Information to an Employee Record

1. Click **Employees** in the left menu. Your list of employees opens.
2. Click on the employee record to open it.
3. Click the **Medical** box.
4. Select the date of the last physical if applicable.
5. Select the date of the next physical appointment if applicable.
6. Enter the name of the employee's doctor and the doctor's phone number.
7. Select the Blood Type from the drop-down list.
8. Enter the name of the Insurance and the Policy number.
9. Enter any notes if desired.

Payroll

You can determine your center's payroll schedule and pay period through the My Center settings.

1. Click **My Center** in the left menu.
2. Click **Payroll / Time Off** at the top menu. The Payroll / Time Off window opens.
3. Select the first pay date on a new schedule.
4. Select the pay frequency.
5. Select the first day of the week.
6. Your selections are automatically saved.

Manage Employee Time Off

The Manage Employee Time Off feature enables you to track your employees' time off and even define the time off options that best fit your payroll system.

It also gives you the ability to automate some time off tracking such as setting default values for each time off option, determining when the default value resets (such as yearly PTO), and selecting automatic time off deductions from employee schedules.

Add Time Off Option

1. Click **My Center** in the left menu.
2. Click **Payroll / Time Off** at the top menu. The Payroll / Time Off window opens.
3. Click the three dots on the right and select **Add Time Off Option**.
4. Enter a name for the option.
5. Select the time off type.
6. Enter a default value for the time off, if desired. This will populate the employee's time off amount when this option is used.

   Check the "Reset Default Value" box, if desired. Enter the values to automatically reset the time off amount.
7. Click **Add Time Off Option**.

Edit Time Off Option

1. Click **My Center** in the left menu.
2. Click **Payroll / Time Off** at the top menu. The Payroll / Time Off window opens.
3. Click on the time off option in the list you want to edit.
4. Enter your edits and click **Save Changes**.

Delete Time Off Option

1. Click **My Center** in the left menu.
2. Click **Payroll / Time Off** at the top menu. The Payroll / Time Off window opens.
3. Click on the time off option in the list you want to delete.
4. Click the three dots at the top right and select **Delete Time Off Option**.
5. Click **Confirm** to delete.

Manually Add / Remove Time Off on Employee Time Sheet

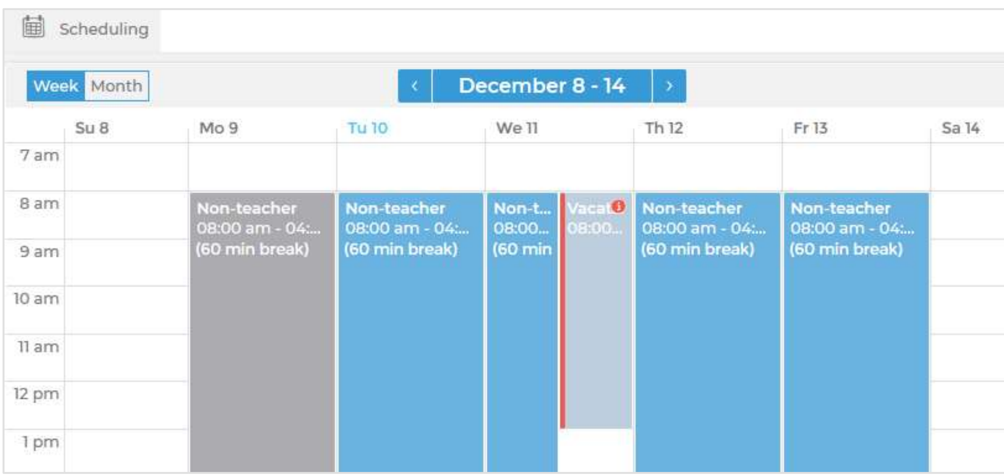
1. Click **Employees** in the left menu. Your list of employees opens.
2. Select an employee from the list. The employee's record opens.
3. Select the **Time Sheet** box. The Time Sheet window opens.
4. Enter a value under the Hours column. Changes are automatically saved.

Add a Time Off Event to an Employee Schedule

When you add a time off event to an employee's schedule, the hours will automatically be deducted from the employee's time off after the event occurs.

1. Click **Employees** in the left menu. Your list of employees opens.
2. Select an employee from the list. The employee's record opens.
3. Click **Scheduling** at the top menu.
4. Click the three dots at the top right and select **Add schedule**.
5. Complete the details and click **Add Schedule** to save.

Note: Time off events that conflict with an employee's work schedule display a red line.



View or Edit Time Sheet for an Employee

If you need to adjust the Time Sheet for an employee, you can do so through the Time Sheet function. You can also perform a bulk clock in/out for multiple employees. Note that Smartcare will automatically sign out anyone not yet signed out by 11:59pm.

View Time Sheet

1. Click **Employees** in the left menu. Your list of employees opens.
2. Select an employee from the list. The employee's record opens.
3. Select the **Time Sheet** box. The Time Sheet window opens displaying the time in and out for the employee and the time off hours.

Edit Time Sheet (Clock In/Out)

1. Click **Add Time**. The Add Time window opens on the right.
2. Enter the date.
3. Enter the time in and out.
4. Select the role from the drop-down list.
5. Click **Save Changes** at the bottom.

Perform Bulk Clock In/Out for Multiple Employees

1. Click **Employees** in the left menu. Your list of employees opens.
2. Select multiple employees by hovering over their names and clicking the selection box.
3. Click the three dots above the sort icon and select **Bulk Update**.
4. Select **Clock In** or **Clock Out** from the drop-down menu.
5. Enter the time.

7. Click **Update Employees**.

Manage Employee Notes

Add an Employee Note

1. Click **Employees** in the left menu. Your list of employees opens.
2. Select an employee from the list. The employee's record opens.
3. Select the **Notes** box. The Notes window opens.
4. Click the three dots in the top right and select **Add a Note**.
5. Enter the note and select the date.
6. Click **Add Note** to save.

Note: Notes can only be edited or deleted by the original user who created the Note in the profile.

Edit an Employee Note

1. Click the **Notes** box on the employee's profile page.
2. Click the note you want to edit.
3. Make your edits and click **Save changes**.

Delete an Employee Note

1. Click the **Notes** box on the employee's profile page.
2. Click the note you want to delete.
3. Click the three dots in the top right and select **Delete this note**.
4. Click **Yes** to confirm.

Manage Employee Documents

Add a Document to an Employee's Profile

The following file types can be added to an employee's profile under the Documents section: .doc, .docx, .xls, .pdf, .tif, .tiff, .png, .jpeg, .jpg, .gif

1. Click **Employees** in the left menu. Your list of employees opens.
2. Select an employee from the list. The employee's profile opens.
3. Select the **Documents** box. The Documents window opens.
4. Click the three dots in the top right and select **Add a document**. You are then prompted to locate the document on your computer.
5. Enter a File Name if different than the default shown.
6. Enter a note if desired.
7. Click **Upload Document**.

Edit a Document's Name or Notes on an Employee's Profile

1. On the employee's profile, click the **Documents** box. The Documents window opens.
2. Click on the row of the document you want to edit.
3. Make your changes and click **Save Changes**.

Delete a Document on an Employee's Profile

1. On the employee's profile, click the **Documents** box. The Documents window opens.
2. Click on the row of the document you want to delete.
3. Click the **trash** icon.

Archive an Employee Record

1. Click **Employees** in the left menu. Your list of employees opens.
2. Locate the employee and click on the row to open it. The Employee Profile window opens.
3. Click **Archive Employee** on the right.
4. Click **Continue** to archive the employee record.

Restore an Employee Record from the Archive

1. Click **My Center** in the left menu.
2. Click **Archive** at the top menu. The Archive window opens.
3. Click **Employees** to view a list of archived records.
4. Click **Restore** to the right of the name.
5. Click **Continue** to restore the record.

Billing

Billing settings enable you to set up accounting codes, billing schedules, tuition plans, subsidy/agency accounts, and create split billing. You can access Billing through the My Center settings.

Set Up Accounting Codes

When setting up your accounting codes, you can include a "default amount." This is helpful when you have specific accounting codes that you use for manual credits or charges that are almost always the same amount.

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Accounting Settings** at the top menu. The Accounting Settings window opens.
3. In the Accounting Codes sections on the right, click the three dots and select **Add New Code**.
4. Enter the name, the GL Account, and select the code type.
5. Enter a default amount for the code, if desired.
6. Click the checkbox to mark this code Active.
7. Click **Continue** to save.

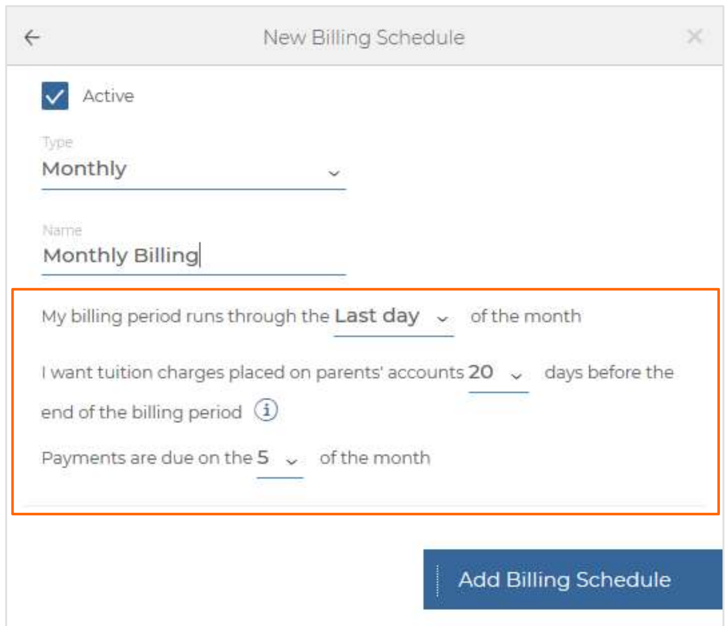
Note: You can add default amounts to accounting codes already created. Simply click the **pencil** icon next to the code and add the amount in the Default Amount field, then click **Continue** to save.

Edit or Delete Accounting Codes

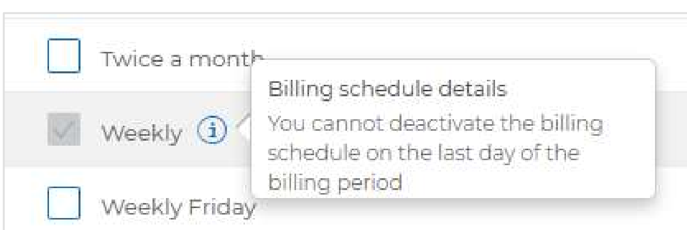
1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Accounting Settings** at the top menu. The Accounting Settings window opens.
3. In the Accounting Codes sections on the right, locate the code.
    a. **Edit:** Click the **pencil** icon. Make your changes and click **Continue** to save.
    b. **Delete:** Click the **trash** icon. Click **Yes** to confirm.

Set Up the Billing Schedule

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Billing Schedules**. The Billing Schedule options open on the right.
4. Click the three dots on the right and select **Add Billing Schedule**.
5. Select schedule type from the drop-down menu.
6. Enter a name for the billing schedule.
7. Select the billing schedule settings from the drop-down menus.
8. Click **Add Billing Schedule**.



Once you set up your billing schedules, you can modify them as needed. However Smartcare has built-in validation rules to ensure that any modifications do not adversely affect the schedule such as skipped billing or duplicate charges. If you cannot edit a billing schedule, hover over the **Information** icon to read the reason.



Validation Rules

- If the billing schedule end date is today, you cannot edit. Ensures tuition charges are applied during the billing period.
- Billing Schedule Type can only be changed for an inactive Billing Schedule. Avoids charges being missed from being applied or applied twice during a billing period.
- If tuition charges have already been placed on an account, you cannot edit. Avoids duplicate charges from being placed on an account.

Set Up Tuition Plans

Set Up Flat Fee Tuition Plan

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Tuition Plans**. The Tuition Plan options open on the right.
4. Click the three dots on the right and select **Add tuition plan**.
5. Enter information for the Flat Fee tuition plan.
    a. **Plan Name:** Type a name of your choice.
    b. **Type:** Select Flat Fee.
    c. **Billing Schedule:** Select when you want billing to occur.
    d. **Billing Code:** Select the billing code.
    e. **Plan Rate:** Type the amount to be charged.
    f. **Start Date:** Select a start date. The Tuition Plan must be active before a cycle can be added to parent/guardian accounts.
    g. For future rate increases, click **+** and enter a new rate and start date. The tuition plan will automatically update on the start date.
6. Click **Add tuition plan** to save.

Set Up Attendance-Based Billing Plan

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Tuition Plans**. The Tuition Plan options open on the right.
4. Click the three dots on the right and select **Add tuition plan**.
5. Enter information for the Attendance-based tuition plan:
    a. **Plan Name:** Type a name of your choice.
    b. **Type:** Select Attendance-based.
    c. **Billing Schedule:** Select when you want billing to occur.
    d. **Billing Code:** Select the billing code.
    e. **Charged Every:** Select the frequency for the charge.
    f. **Apply charges at end of the billing period:** Select in order to utilize the "dollar amount tuition plan splits" functionality.
    g. **Calculate time increments at end of the billing period:** Select if desired. Available when "Apply charges at end of the billing period" is checked.
    h. **Plan Rate:** Type the amount to be charged.
    i. **Start Date:** Select a start date. The Tuition Plan must be active before a cycle can be added to parent/guardian accounts.
    j. For future rate increases, click **+** and enter a new rate and start date. The tuition plan will automatically update on the start date.
6. Click **Add tuition plan** to save.

Change Tuition Rate

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Tuition Plans**. The Tuition Plan options open on the right.
4. Click on the name of a Tuition Plan to edit.
5. Enter the new Plan Rate and click **Save Changes**.

Add New Tuition Rate for Future Billing Cycle

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Tuition Plans**. The Tuition Plan options open on the right.
4. Click on the name of a Tuition Plan to edit.
5. Click **Add new rate schedule**.
6. Enter the new Plan Rate and select the Start Date.
   Note: The Start Date should be 1 day prior to the day that charges will post for your new tuition rates. For example: If your tuition charges post on a Thursday then the start date should be the Wednesday prior to the effective date.
7. Click **Save Changes**.

Delete a Tuition Plan

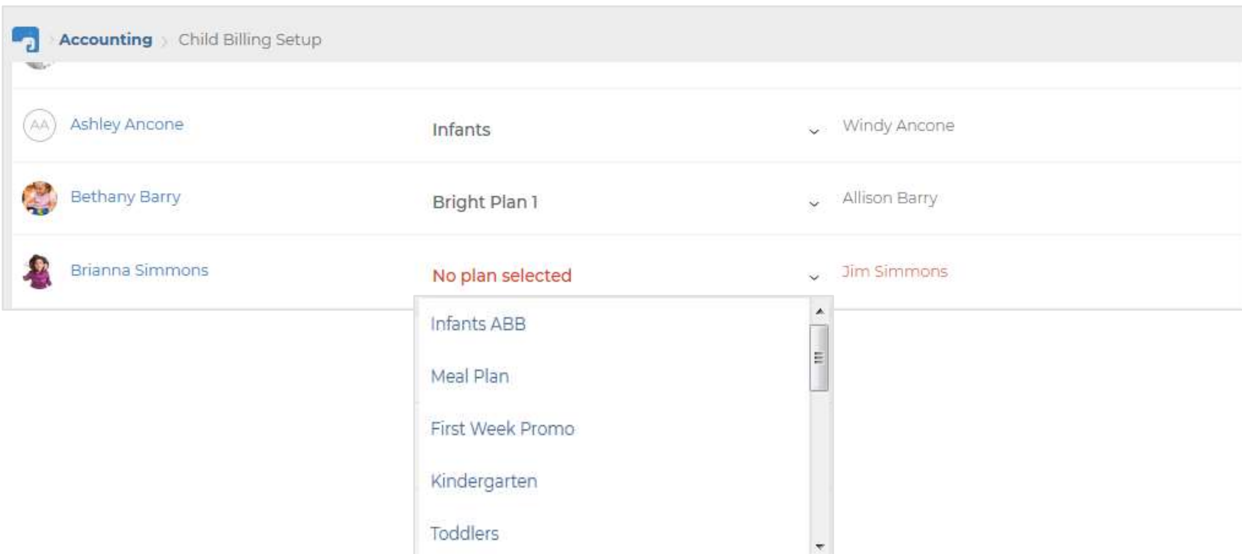
When you choose to delete a Tuition Plan, note that you can only delete Tuition Plans that are not assigned to one or more children.

You can run the Child Tuition Plan report to view a list of Tuition Plans and their assignment, and then assign a different Tuition Plan to any children that have the Tuition Plan that you want to delete.

1. Click **My Center** in the left menu.
2. Click **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click on Tuition Plans. The Tuition Plans side panel opens on the right.
4. Click on the Tuition Plan you want to delete, select the three dots at the top right and select **Delete Tuition Plan.**
5. Click **Delete** to confirm.

Set Up Child Billing Plan

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select **Child Billing Setup** at the top menu. Your list of children opens.
3. Scroll to locate the child.
4. Under the Plan column, click No plan selected. A list of tuition plans displays.
5. Select the desired plan from the list. See also Set Up Tuition Plans.
6. Click **Yes** to confirm.



Change a Tuition Plan On a Child's Profile

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select **Child Billing Setup** at the top menu. Your list of children opens.
3. Scroll to locate the child.
4. Under the Plan column, click the drop-down arrow and select another plan from the list.

Remove a Tuition Plan from a Child's Profile

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select **Child Billing Setup** at the top menu. Your list of children opens.
3. Scroll to locate the child and click on the row to open it.
4. Click on the Tuition Plan you want to remove. The plan opens on the right.
5. Click the three dots at the top right and select **Remove this plan**.

Add a Subsidy / Agency Account

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Agencies**. The Agency options open on the right.
4. Click the three dots on the right and select **Add agency**.
5. Type the agency's name.
6. Click **Add agency** to save.

Add Agency Billing to a Child's Profile

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's Profile opens.
3. Click the **Billing** box. The Billing window opens.
4. Select a Tuition Plan from the list. The Tuition Plan opens on the right.
5. Click the three dots at the top right again and select **Add a split**.
6. Under the Account section, select the appropriate agency from the drop-down list. See also Add a Subsidy / Agency Account.
7. Enter the amount that the agency pays.
8. Click **Save Changes**.

Add Split Billing to a Child's Profile

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's Profile.
3. Click the **Billing** box. The Billing window opens.
4. Select a Tuition Plan from the list. The Tuition Plan opens on the right.
5. Click the three dots at the top right again and select **Add a split**.
6. Under the Account section, select an account from the drop-down list.
7. Enter the amount and type (dollar or percentage) the primary account pays. The secondary account will automatically be assigned the remainder of the amount.
8. Repeat the above three steps to add additional splits if desired.

   To change which account is primary for the plan, click the arrow above the account name to move it up or down. The account at the top is primary for the plan.
9. Click **Save Changes**.

Add Dollar Amount Split for Attendance-Based Billing Plan

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list. The child's Profile.
3. Click the **Billing** box. The Billing window opens.
4. Select an Attendance-Based Billing Plan from the list (see Set Up Attendance-Based Billing Plan). The Billing Plan opens on the right.
5. Click the three dots at the top right again and select **Add a split**.
6. Under the Account section, select an account from the drop-down list.
7. Enter the amount the primary account pays and select dollar ($) for the Type. The secondary account will automatically be assigned the remainder of the amount.
8. Repeat the above three steps to add additional splits if desired.

   To change which account is primary for the plan, click the arrow above the account name to move it up or down. The account at the top is primary for the plan.
9. Click **Save Changes**.

Close a Billing Account

1. Click **Families** on the left menu. Your list of families opens.
2. Locate the family and click on it to open the family record.
3. Click on the person where you want to close the billing account.
4. Click the **Billing** box.
5. Click the three dots at the top right and select **Close Account**.

Set Up Recurring Discounts

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Discounts**. The Discount options open on the right.
4. Click the three dots on the right and select **New discount type**.
5. Enter the name and amount for the discount.
6. Select the discount type from the drop-down menu. This will treat the discount amount you entered as either a percentage or fixed amount.
7. Select the Billing Code from the drop-down menu. See also Set Up Account Codes.
8. Click **Add discount** to save.

Apply Recurring Discounts

You can add one or more discounts to a Tuition Plan. Note that discounts are always applied to the original tuition amount.

1. Click **Children** in the left menu. Your list of children opens.
2. Select a child from the list.
3. Click the **Billing** box. The Billing window opens.
4. Select a Tuition Plan from the list. The Tuition Plan opens on the right.
5. Under Allocations, click the **pencil** icon next to the account owner’s name.
6. Click Add discount and select the discount type from the drop-down list. The discount amount displays. Click **Add discount** to add another if desired.
7. Click **Save changes**.

Set Up Conditional Billing

Set Up Early Drop Off Fee

1. Click **My Center** in the left menu. The My Center window opens.
2. Click **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Early Drop Off Fee**. The Early Drop Off Fee options open on the right.
4. Select an Accounting Code from the drop-down menu.
5. Select the Bill By from the drop-down menu:
    a. **Child Schedule:** For use when you use the Smartcare Center App. Fees are calculated by an individual child's schedule.
    b. **Fixed Time:** For use if you prefer to set a fixed time or when you don't use the Smartcare Center App. When you choose this option, enter the time.
6. Select the fee type from the drop-down menu and enter the amount.
7. Check the box for a grace period if desired. Enter the grace period in minutes.
8. Check the box for the maximum to be charged if desired. Enter the maximum amount to be charged.
9. Click **Save Changes**.

Set Up Late Pickup Fee

1. Click **My Center** in the left menu. The My Center window opens.
2. Click **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Late Pickup Fee**. The Late Pickup Fee options open on the right.
4. Select an Accounting Code from the drop-down menu.
5. Select the Bill By from the drop-down menu:
    a. **Child Schedule:** For use when you use the Smartcare Center App. Fees are calculated by an individual child's schedule.
    b. **Fixed Time:** For use if you prefer to set a fixed time or when you don't use the Smartcare Center App. When you choose this option, enter the time.
6. Select the fee type from the drop-down menu and enter the amount.
7. Check the box for a grace period if desired. Enter the grace period in minutes.
8. Check the box for the maximum to be charged if desired. Enter the maximum amount to be charged.
9. Click **Save Changes**.

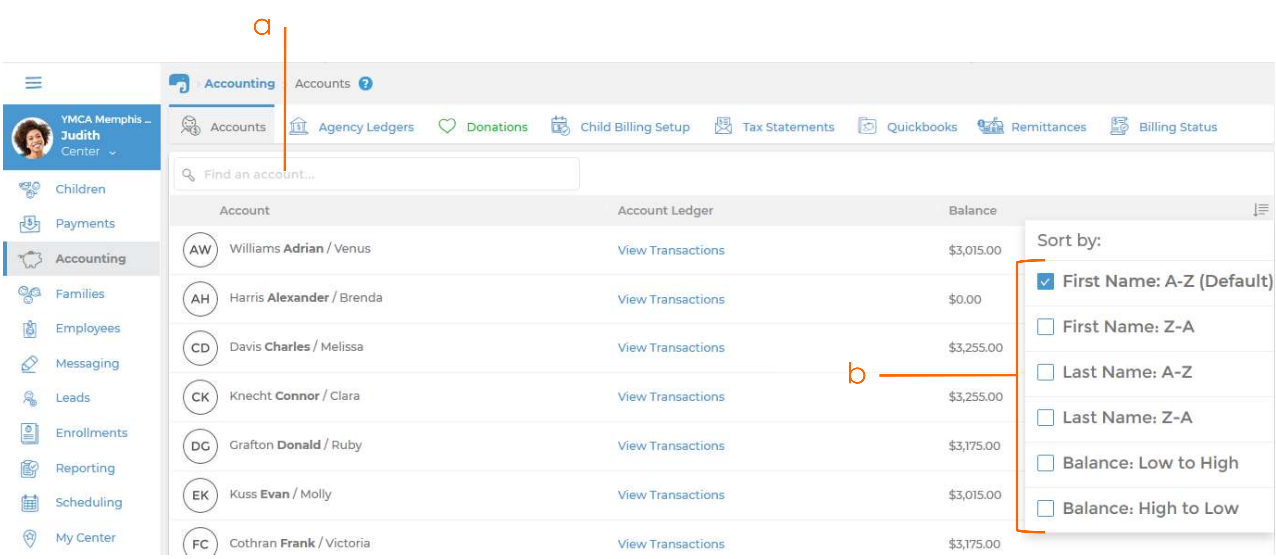
Set Up Late Payment Fee

1. Click **My Center** in the left menu. The My Center window opens.
2. Click **Billing Settings** at the top menu. The Billing Settings window opens.
3. Click **Late Payment Fee**. The Late Payment Fee options open on the right.
4. Select an Accounting Code from the drop-down menu.
5. Enter the number of days past due for when an account owner is to be charged.
6. Enter the amount to be charged.
7. Select the Payment Bill Type from the drop-down menu. This will treat the amount you entered in the previous step as either a percentage or fixed amount.
8. Click **Save Changes**.

Accounting

Search and Sort Accounts List

1. Click **Accounting** in the left menu. Your list of accounts opens.
    a. Enter all or part of a name and click **Enter** on your keyboard to display all matches to your entry.
    b. Click on a box to sort by first or last name, or balance low or high.



View Transaction Activity

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Click on account owner from the list. The account profile opens on the right.
3. Click on any transaction in the list to view details.

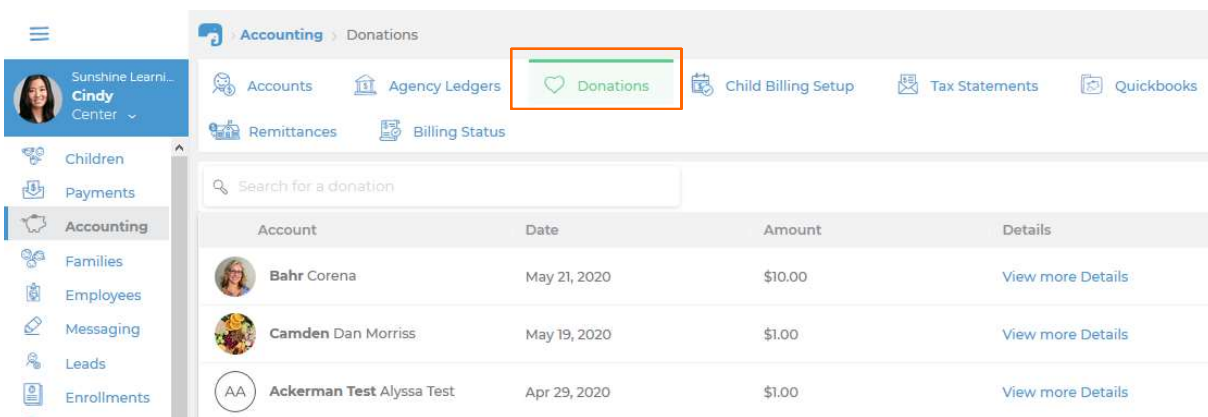
Donations

Your center can receive donations from parents using the Donations feature in their Smartcare for Parents app.

On the Billing screen for parents, a "Make a Donation" button allows parents to make a payment even if they don't have any payments outstanding.

Donations are listed under the Accounting menu, and can be managed directly from there.

1. Click **Accounting** in the left menu.
2. Select **Donations** at the top menu. The Donations window opens.
3. Click **View More Details** to the right of the parent's name to apply the donation.



Require Auto-Pay

As a center, you can require all accounts to participate in Auto-Pay. Once you enable this function, any primary account holder who has not entered payment information for auto-pay will see a notification upon logging in to the Parent App and cannot continue until payment information is completed. If necessary, you can also add account holders as exceptions when Auto-Pay is enabled.

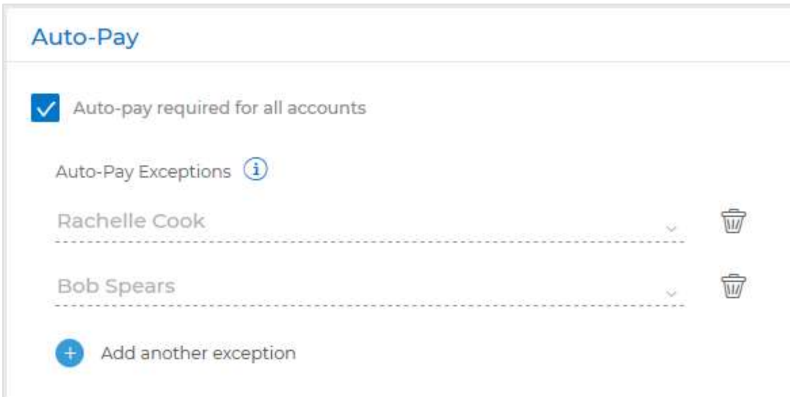
For secondary account holders, if payment information has not yet been entered, they can navigate to all features except "Pay Now."

1. Click **My Center** in the left menu.
2. Select **Account Settings** at the top menu. The Accounting Settings window opens.
3. Under Auto-Pay, click the "Auto-pay required for all accounts" checkbox. All account holders will now be prompted to add payment information upon logging in to the Parent App.

Add Exceptions to Auto-Pay

If you need to add exceptions when Auto-Pay is enabled, you can do so at any time. If Auto-Pay is already enabled, adding an exception immediately removes the auto-pay requirement from that person's account. The account holder will receive an email that they have been removed from Auto-Pay.

1. Click **My Center** in the left menu.
2. Select **Account Settings** at the top menu. The Accounting Settings window opens.
3. Under Auto-Pay, click the **plus** icon to add an exception. Begin typing the name of the account holder or scroll through the list to select.



Remove an Exception from Auto-Pay

If you remove an account holder from the exceptions list, that person will see a notification to add payment information the next time they log in to the Parent App.

1. Click **My Center** in the left menu.
2. Select **Account Settings** at the top menu. The Accounting Settings window opens.
3. Under Auto-Pay, click the **trash** icon next to the account holder you want to remove from the list.

Enter a Manual Charge

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select an account owner from the list. The account profile opens on the right.
3. Click the three dots at the top right and select **Add a charge**.
4. Enter the charge information and click **Add**.

Assign a Manual Charge as Tuition

This feature gives you the flexibility to assign a manual charge for unique billing scenarios. For example, when you are unable to add a tuition plan to a child's account prior to billing running, or the child enrolled mid-month so you want to bill them for partial tuition.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select an account owner from the list. The account profile opens on the right.
3. Click the three dots at the top right and select **Add a charge**.
4. Select the child from the drop-down list.
5. Click the **Tuition charge** checkbox and enter the charge information.
6. Click **Add**.

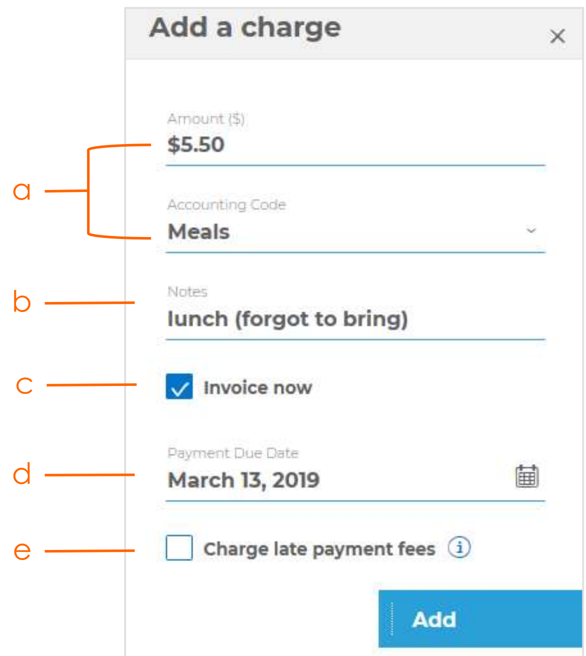
Assign a Manual Charge to Children

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select an account owner from the list. The account profile opens on the right.
3. Click the three dots at the top right and select **Add a charge**.
4. Select the child from the drop-down list.
5. Enter the charge information.
6. Click **Add**.

Initiate an Invoice Now

The Invoice Now feature enables you to add a charge to a parent's account and bill them immediately without having to wait for the statement period to close. If you want to use Invoice Now to bill multiple accounts, see Perform Bulk Actions Using Children List.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select an account owner from the list. The account profile opens on the right.
3. Click the three dots at the top right and select **Add a charge**.
    a. Enter the charge information.
    b. Enter any notes if desired.
    c. Select the **Invoice now** checkbox.
    d. Select the payment due date. By default, the due date is one day in the future.
    e. Optional: If your center charges late payment fees, select this checkbox if desired. See Set Up Late Payment Fee.
4. Click **Add**. The account holder will receive an email with the invoice amount, charge description and payment due date.



Enter a Manual Credit

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select an account owner from the list. The account profile opens on the right.
3. Click the three dots at the top right and select **Add a credit**.
4. Enter the credit information and click **Add**.

Allocate a Credit Manually

By default, Smartcare applies credits to the oldest service charge with a balance. However, if you want to choose how to allocate the credit, you can do so manually. See also Edit Allocations.

1. Click **Accounting** in the left menu. Your list of family accounts opens.
2. Locate the account owner and click on the name to view the account.
3. Click the three dots in the top right and select **Add a credit**.
4. Enter the credit information and select the **Manually Allocate Credit** checkbox.
5. Click **Continue to allocation**. The Allocate Credit window opens. By default, charges with a balance only are displayed. Click **All** on the right to view a list of all charges.
6. Enter the credit amount to the charge(s) in the Allocation column. When you enter the full credit amount, the banner at the top will turn from red to green.

   Alternatively, you can select “Show System Allocation” to allocate the amount to the oldest date of service with an outstanding balance.
7. Add any additional notes if desired.
8. Click **Save Changes** at the top right, and then click **Add Credit** to finish.

Edit Allocations

If you have allocated a payment or credit but need to change the allocation at a future date, you can do this through the Accounting function.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Locate the account holder and click **View Transactions**.
3. Locate the transaction to be reallocated. Click the three dots next to the transaction and select **Edit Allocations**. The Edit Allocations window opens.
4. Enter the new amount(s) to the charges in the Allocation column. When you enter the full amount due, the banner at the top will turn from red to green.
5. Add any additional notes if desired.
6. Click **Save Changes** at the top right, and then click **Save Allocations** to finish.

Download and/or Print a Receipt

Smartcare payment receipts are FSA compliant.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Locate the account owner and click on the name to view the account.
3. Click the three dots in the top right and select **Download receipts**.
4. Enter a date range, if desired, to narrow down the list of receipts.
5. Select one or more payments by checking the box next to the payment. You can also check "Select all."
6. Click **Download receipts**. The receipts are downloaded as a PDF document and you can either email it or print it out for the account holder.

Process a Refund

Note: The refund feature in Smartcare is currently disabled. There are two ways to process a refund, either through Smartcare or by processing a manual refund.

We know that the timing of receiving a refund is important. To ensure a parent receives funds as quickly as possible, the fastest way to process a refund is to issue a check or initiate a direct ACH transfer from your bank to the parent's bank, and then enter a charge in Smartcare for the refund amount. See Process a Manual Refund. This also ensures that balances in Smartcare are accurate. However, you may choose to process refunds through Smartcare.

Process a Refund Through Smartcare

To process a refund through Smartcare, please follow the steps below.

1. Email Smartcare at Smartcare Transactions with the following information:
    a. The name of your center.
    b. A list of refunds to be processed.
    c. The deposit amount totaling the amount of refunds.
2. Send the total deposit amount to:
   Wire ABA Routing number: 042000314
   Account number: 1830038717

   Fifth Third Bank
   38 Fountain Square Plaza,
   Cincinnati, OH 45263

Once your total deposit amount and refunds list has been received and processed, the option to process refunds through Smartcare will become temporarily available. The deposit amount will be held in your Smartcare account and used to process refunds for your parents.

Note: The refund feature is enabled through Smartcare after the above steps are completed. Refunds can be processed for credit card and ACH payments made within the past 12 months. See the table below for refund processing times.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Locate the account holder and click **View Transactions**.
3. Locate the transaction to be refunded. Click the three dots next to the transaction and select **Refund**.
   Note: If you do not see the Refund option, it indicates the transaction is not eligible for the refund function.
4. Enter the refund amount if different than the default total indicated.
5. Click **Continue** and then click **Confirm** to finalize the refund.

Processing Times for Refunded Payments
ACH Payments
5 Business Days Daily Cut-Off Time: 4:50pm PST
• Smartcare sends ACH transactions for processing once per business day at 4:50pm PST* • Refund requests received after the daily cut-off time will be processed the next business day at 4:50pm PST • ACH refunds are a direct credit to the parent's bank account * Processing does not start immediately from the time the user selects "Refund" in Smartcare
Example #1 If your center submits an ACH refund in Smartcare on Wednesday at 2:30pm PST, this refund will begin processing the same day (Wednesday) at 4:50pm PST. The funds should be received in the parent's bank account by the following Tuesday (5 business days). Example #2 If your center submits an ACH refund in Smartcare on Wednesday at 5:10pm PST, this refund will begin processing the next day (Thursday) at 4:50pm PST since it is after the cut-off time. The funds should be received in the parent's bank account by the following Wednesday.
Credit Card Payments
5 Business Days* Daily Cut-Off Time: 7pm PST

Processing Times for Refunded Payments

- Credit card refunds are sent in real-time to a third-party credit card payment processor, Vantiv
- Vantiv then works directly with the cardholder's bank to refund the payment back to the original card per the bank's processing times*
- Refund processing begins immediately from the time the user selects "Refund" in Smartcare

.

* Processing times vary by bank so it may take more than 5 business days for the refund to post to the parent's bank account (check pending items in the account)

Example

If your center submits a credit card refund in Smartcare on Friday at 7:30am PST, this refund will begin processing immediately since there are no cutoff times for credit cards. The funds should be received on the parent's credit card by the following Thursday (5 business days).

FAQs

Why are the credit card processing times so long?

Due to refund processing times varying by bank, the processing times depend on when the issuing bank puts the funds back into the cardholder's account.

Why are some payments not yet eligible for a refund?

If you see an error message that a payment is not yet eligible for a refund, it means that the original transaction has not yet settled.

Settling transactions takes between 24-48 hours, therefore, check back after 48 hours from the original payment date/time and you should be able to refund the payment.

Will the original transaction fee be refunded to the parent too?

Yes, if your center has the parent pay the transaction fees (ACH or credit card), then the original transaction fee amount will also be refunded to the parent's bank account or credit card.

What should I do if my parent does not receive their refund within the processing times stipulated (5 business days for ACH and credit cards)?

Processing Times for Refunded Payments
Parents should contact the banking institution directly first to validate if the bank has record of the refund transaction. If not, please contact Smartcare Support at (844)-SMARTER or email support@smartcare.com.

Process a Manual Refund

To process a manual refund, you will first create a "manual refund" code and then proceed to processing the refund.

Create a Manual Refund Code

1. Click **My Center** in the left menu. The My Center window opens.
2. Select **Accounting Settings** at the top menu. The Accounting Settings window opens.
3. In the Accounting Codes sections on the right, click the three dots and select **Add New Code**.
4. Enter the name for the code as "Manual Refund."
5. Enter the Accounting Software GL Account code of your choice.
6. Select **Refund** from the drop-down list as the code type.
7. Click **Continue** to save.

Process the Refund

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Locate and click on the account holder. The account holder's balance and activity displays on the right.
3. Click the three dots at the top right and select **Add a charge**.
4. Enter the child's name and select Manual Refund as the accounting code. The charge amount will be the same as the refund amount.
5. Click **Add**.
6. Click the three dots at the top right and select **Add a credit**.
7. Select **Manual Refund** from the drop-down list for the accounting code.
8. Enter the same amount as the charge created above.
9. Click **Add**.

Void a Payment

Voids can be processed for charges or for payments made with check, cash, credit card or money order within the past 12 months.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Locate the account holder and click **View Transactions**.
3. Locate the transaction to be voided. Click the three dots next to the transaction and select **Void**.
   Note: If you do not see the Void option, it indicates the transaction is not eligible for the void function.
4. Click **Confirm** to finalize the void.

View Remittances

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Click **Remittances** in the top menu. Your list of remittances opens.
3. Select a date range, if desired, to filter the list.
4. Click **Download Report** to view the Remittance Statement.

View Billing Status

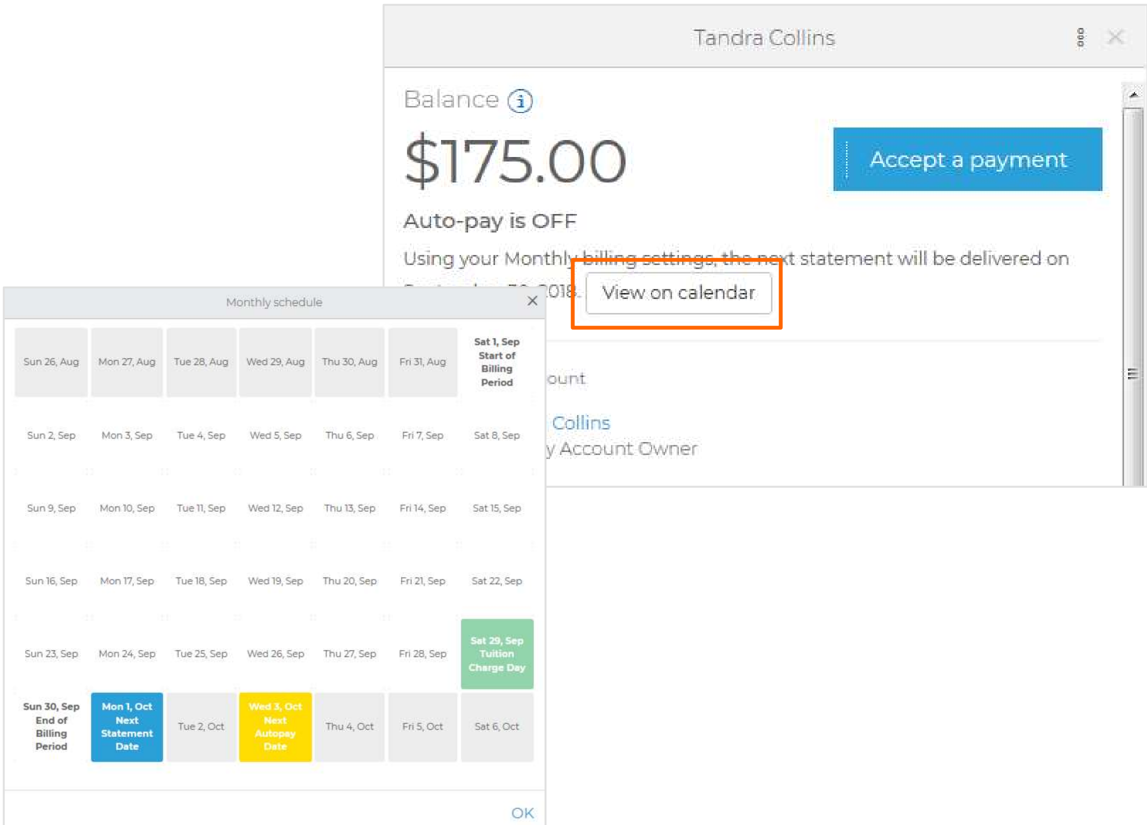
The Billing Status function enables you to see the details related to statement periods during a selected date range.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Click **Billing Status** in the top menu.
3. Enter a date range. The following details displays:
    - **Sum of Charges:** displays the exact $ amount that parents were charged in the billing period
    - **Statement Sent:** displays the date billing statements were sent to parents within that account billing period
    - **Payment Due:** displays the date auto-pay will run for any parents on auto-pay
    - **Remittance Due:** displays the date the center should expect deposits from the auto-pay run
4. Click **View Details** to the right of each statement period to launch the Billing Status Details report.

Note: For any billing periods in the range that have not yet closed, the Sum of Charges will be blank and the key dates (Statements Sent, Payments Due, and Remittance) will be estimates.

View Calendar for Billing Dates

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select an account owner from the list. The account profile opens on the right.
3. Click **View on calendar**. A monthly calendar view opens to display key billing dates for your parent accounts.
4. Click **OK** to close.



Resend a Statement

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Select an account owner from the list. The account profile opens on the right.
3. Locate the statement you want to resend and click on it to open.
4. Click the three dots at the top right and select **Resend this statement**.

Download or Send Tax Statements

Tax Statements can be generated for individual accounts or in bulk. Each Tax Statement displays the children with tuition plans assigned and all payments made by the parent(s) for the date range specified. Statements also include your Center's contact information and Federal and State Tax ID as entered under Center Information.

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Click **Tax Statements** at the top menu.
3. Click the **Filter** icon, if desired, to narrow down the list to active or closed accounts.
4. Locate the account and click the three dots at the right side of the row. Select either **Send email** or **Download**.
5. Enter the date range for the tax statement and click **Continue**. This will either automatically send an email to the recipient or save as a download to your computer based on the option you initiated.

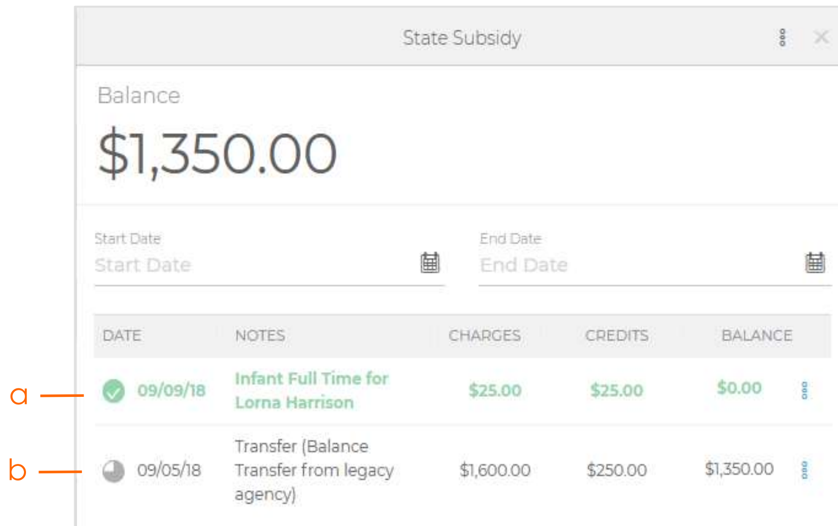
Email or Download Bulk Tax Statements

1. Click **Accounting** in the left menu. Your list of accounts opens.
2. Click **Tax Statements** at the top menu.
3. Click the three dots at the top right and select **Email Tax Statements** or **Download Tax Statements**.
4. Enter the date range.
5. Check the "Select/Unselect All" box to include everyone in the list, or select individuals by checking the box next to each person's name.
6. Scroll to the bottom and click either **Send Email** or **Download** based on the option you initiated.

Agency Ledgers

View Agency Ledgers

1. Click **Accounting** in the left menu.
2. Click the **Agency Ledgers** tab. The list of agencies tied to child records opens.
3. Click on an agency to view the list of children tied to the agency.
4. Click on a child to view the balance and transaction history or initiate a charge, credit, transfer or void.
5. Click **View Transactions** to view transaction history. Enter a date range to filter the list of transactions.



   a. Indicates the full amount has been allocated.
   b. Indicates the amount has been partially allocated.

Add a Charge to an Agency Ledger

1. Click **Accounting** in the left menu.
2. Click the **Agency Ledgers** tab. The list of agencies tied to child records opens.
3. Click on an agency to view the list of children tied to the agency.
4. Click on the child to open the balance and transaction history.
5. Click the three dots at the top right and select **Add a charge**.
6. Enter the charge information and click **Save Changes**.

Add Credit to a Charge on an Agency Ledger

1. Click **Accounting** in the left menu.
2. Click the **Agency Ledgers** tab. The list of agencies tied to child records opens.
3. Click on an agency to view the list of children tied to the agency.
4. Click on the child to open the balance and transaction history.
5. Locate the line item. Click the three dots to the right and select **Add a credit**.
6. Enter the credit information and click **Save Changes**.

Transfer a Balance From an Agency Ledger

1. Click **Accounting** in the left menu.
2. Click the **Agency Ledgers** tab. The list of agencies tied to child records opens.
3. Click on an agency to view the list of children tied to the agency.
4. Click on the child to open the balance and transaction history.
5. Locate the line item. Click the three dots to the right and select **Transfer Balance**.
6. Enter the transfer information and click **Save Changes**.
7. Click **Confirm** to finalize the balance transfer.

Void a Charge or a Credit on an Agency Ledger

1. Click **Accounting** in the left menu.
2. Click the **Agency Ledgers** tab. The list of agencies tied to child records opens.
3. Click on an agency to view the list of children tied to the agency.
4. Locate the child and click **View Transactions**.
5. Locate the transaction to be voided. Click the three dots next to the transaction and select **Void**.
   Note: If you do not see the Void option, it indicates the transaction is not eligible for the void function.
6. Click **Confirm** to finalize the void.

Add a Remittance for Agency Ledgers

1. Click **Accounting** in the left menu.
2. Click the **Agency Ledgers** tab. The list of agencies tied to child records opens.
3. Click on an agency to view the list of children tied to the agency.
4. Click the **Remittance** tab. Your list of remittances opens.
   Note: Click the **filter** icon to narrow your search when looking for a specific remittance.
5. Click the three dots at the right and select **Add a remittance**. The remittance is automatically named by the system using a combination of the agency name plus a unique numerical identifier.
6. Complete the remittance information.
   a. Select the date if other than the default displayed.
   b. Enter the remittance received amount.
   c. Search for the child to apply an allocation amount. If you choose "click here to show all accounts," any children who have an outstanding balance with the agency will be displayed.
   d. Enter the allocation amount under the Allocation column.
   e. Select a Revenue Date if other than the default.
   f. Add a Note if desired.
   g. Add additional allocations to other children as necessary.
7. Once all of the remittance amount is allocated, the top banner turns from red to green.
8. Click the checkmark at the top right and select **Process Remittance** to complete the action.

Modify Revenue Date for Agency Payment

1. Click **Accounting** in the left menu.
2. Click the **Agency Ledgers** tab. The list of agencies tied to child records opens.
3. Click on an agency to view the list of children tied to the agency.
4. Click the **Remittance** tab. Your list of remittances opens. Click the **filter** icon to narrow your search when looking for a specific remittance.
5. Click on a remittance in the list.
6. Locate the specific charge and select a new date under the Revenue Date column.
7. Click the checkmark at the top right and select **Process Remittance** to complete the action.

Payments

Process a Payment

1. Click **Payments** in the left menu. Your list of family accounts opens.
2. Locate the account and click on it to begin processing a payment.
3. Enter the amount being paid.
4. Select a payment method:
    a. Credit Card: Click **Add new payment method** if no prior credit card information exists. Enter the credit card information. Click **Save Changes**.
    b. Cash: No additional information is required.
    c. Check: Enter the check number.
    d. Bank Account: Enter the bank account information.
    e. Money Order: Enter the money order number.
    f. Other: For use with non-traditional payment methods (i.e., payroll deduction)
5. Enter a note if desired.
6. Enter an email address to send a receipt or select “Download Receipt” to save a copy to your computer and print if desired.
7. Click **Continue**.
8. Click **Process Payment**.

Allocate a Payment Manually

By default, Smartcare applies payment to the oldest service charge with a balance. However, if you want to choose how to allocate the payment, you can do so manually. See also Edit Allocations.

1. Click **Payments** in the left menu. Your list of family accounts opens.
2. Locate the account and click on it to begin processing a payment.
3. Enter the payment amount.
4. Select the **Manually Allocate Payment** checkbox.
5. Enter payment information, and any notes if desired.
6. Enter an email address to send a receipt or select "Download Receipt" to save a copy to your computer and print if desired.
7. Click **Continue to allocation**. The Allocate Payment window opens. By default, charges with a balance only are displayed. Click **All** on the right to view a list of all charges.
8. Enter the payment amount to the charge(s) in the Allocation column. When you apply the full payment amount, the banner at the top will turn from red to green.

   Alternatively, you can select "Show System Allocation" to allocate the amount to the oldest date of service with an outstanding balance.
9. Add any additional notes if desired.
10. Click the checkmark at the top right, and then click **Process Payment** to finish..

Online Payments

Smartcare provides an online payment feature to make it easy for parents and guardians to make payments to your center via the web.

Simply add the following Smartcare URL to your website: https://my.smartcare.com and parents can click this link to log in to the Smartcare Parent Portal using a computer or mobile device to make payments to your center.

Lead Management

Capture Leads Through Your Website

Capturing leads through your website simply requires access to the Smartcare API and may require assistance from your website administrator.

Step 1: Create a Web Form On Your Website
Contact your website administrator to create a web form that will capture information about a lead.

Step 2: Integrate Web Form With Smartcare

1. Access information about Smartcare's APIs for Leads here: https://external-api.smart.care/swagger/ui/index#/Leads
2. At a minimum, use the operations under Leads marked as POST.
    a. If your form supports 2 or more parents, also use the operation under Parents marked as POST.
    b. If your form supports 2 or more children, also use the operation under Children marked as POST.
3. To gain access to the API, please contact Smartcare support.

Create Lead Statuses and Sources

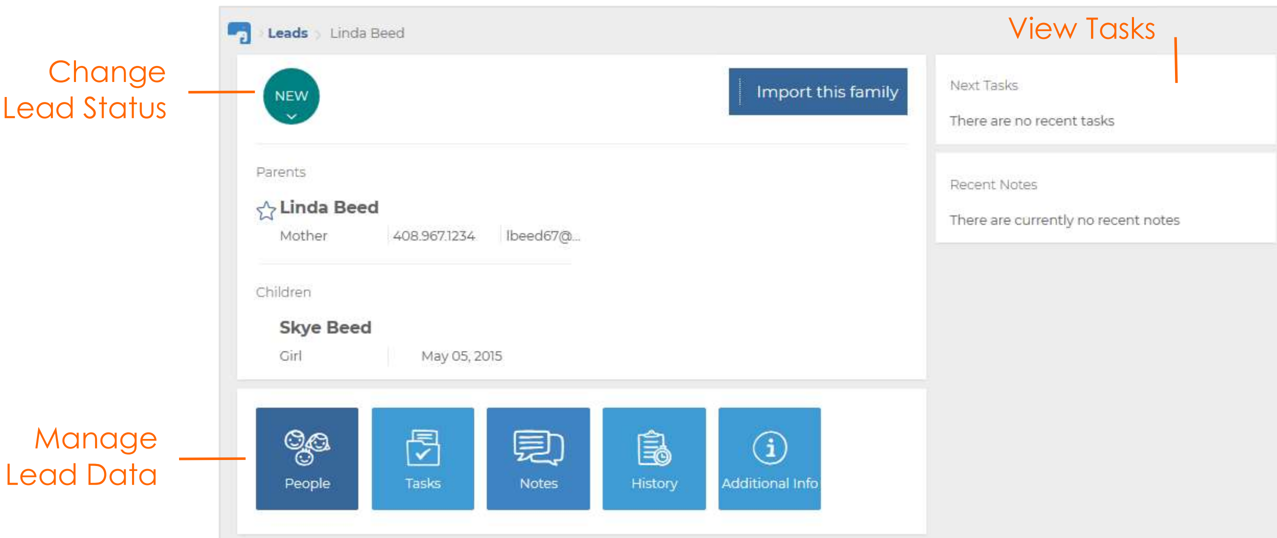
1. Click **My Center** in the left menu.
2. Click the three dots at the top right and select **Add a Lead Status**.
3. Enter the Name of the status and select a color from the drop-down list.
4. Click **Save new lead status** at the bottom.
5. Click the three dots to the right of Lead Sources and select **Add a Lead Source**.
6. Enter the Name of the lead source and click **Save new lead source**. New lead statuses and lead sources will now appear as options within the Leads section.

Create a New Lead

1. Click **Leads** in the left menu.
2. Click the three dots at the top right and select **Add a New Lead**.
3. Select the Lead Source from the drop-down list. See also Create Lead Statuses and Sources.
4. Enter additional information for the lead as desired.
5. Click **Add primary parent** at the bottom. All entered leads will appear on the Leads main window and can be filtered with the **Filter** icon at the top of the list.

View and Edit the Lead Record

1. Click **Leads** in the left menu.
2. Click on a lead to open the record.
3. Click the **People** box to add a parent or child to the record.



Create Tasks for Leads

1. Click **Leads** in the left menu. Your list of leads displays.
2. Click on a lead in the list.
3. Click the **Tasks** box.
4. Click the three dots at the top right and select **Add a New Task**.
5. Enter a Subject for the task.
6. Enter details if desired.
7. Assign the task to a person in the drop-down list.
8. Select a Due Date.
9. Click **Add Task**.

   Note: You can return to this task and send a reminder by clicking the "Send a reminder" checkbox. You can also change the status of this task to "Not Started," "In Progress," or "Complete."

Add Lead Task to Calendar

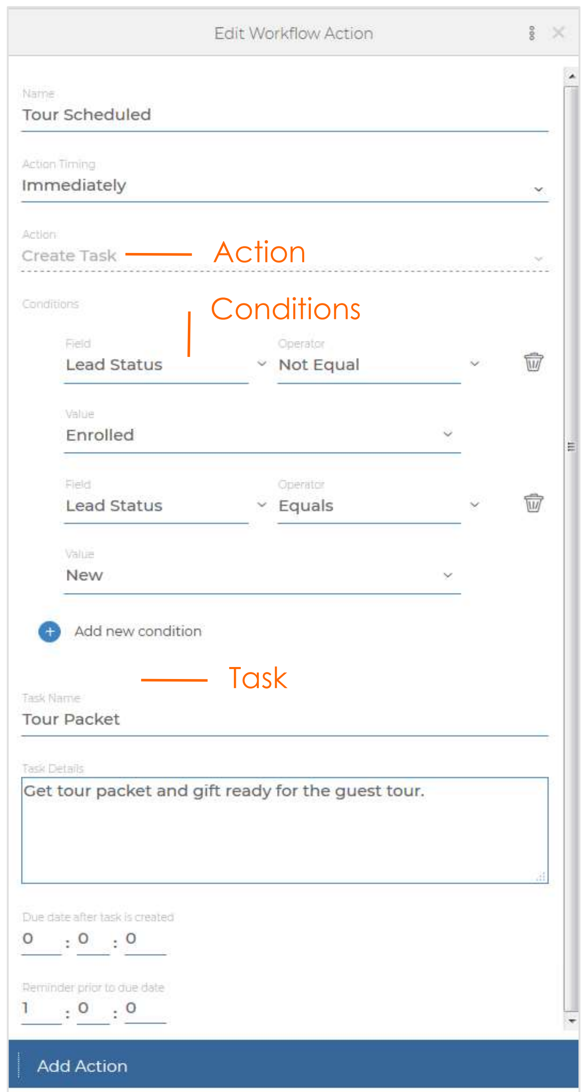
1. Click **Leads** in the left menu. Your list of leads displays.
2. Click Tasks at the top menu. A list of tasks opens.
3. Click on a Task. The Edit Task window opens on the right.
4. Click the three dots at the top right and select **Download to calendar**.
5. Follow the prompts to add it to your calendar.

Create Workflows for Leads

Workflows enable you to automate certain actions for your lead generation efforts. You can create robust workflows to send emails, update data or create tasks when specific conditions are met.

For example, you may create a workflow to send an email to a new parent who has not yet enrolled, then create a task to prepare a tour packet one day before a scheduled tour.

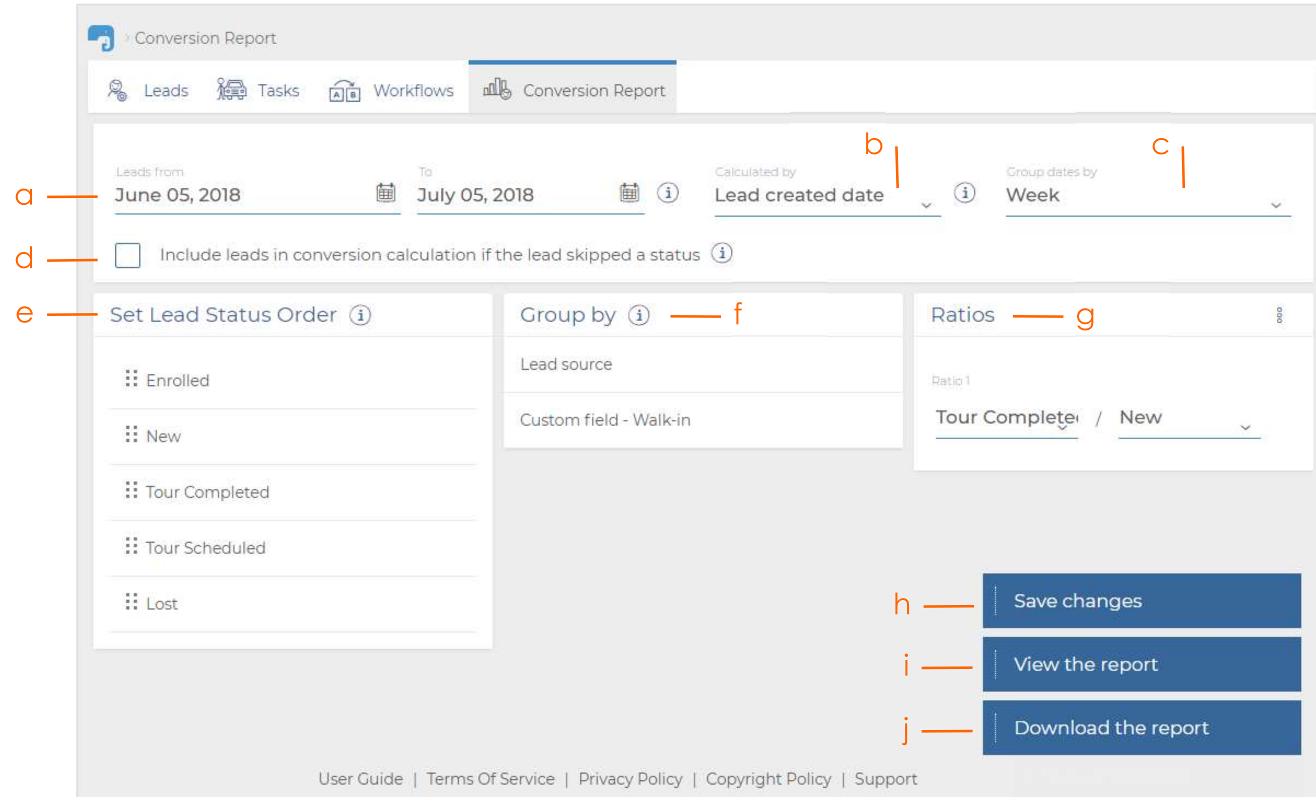
1. Click **Leads** in the left menu. Your list of leads displays.
2. Click **Workflows** at the top menu. A list of workflows opens.
3. Click the three dots at the top right and select **Add Action**.
4. Enter the Name for the workflow.
5. Select when the action should occur.
6. Select the type of action: Send Email, Update Data, or Create Task.
7. For each type of action you can add one or more conditions and tasks.
    a. Select the Condition under which this action applies.
    b. Select an Operator, such as "Equals" or "Contains."
    c. If the condition requires a value, select it from the drop-down list.
    d. Complete the information fields for the action and/or task you want to create.
    e. For tasks, enter a due date and reminder if desired.
8. Click **Add Action**.



View Lead Conversion Report

The Lead Conversion Report is a customizable report that gives you data on conversion ratios for lead efforts.

1. Click **Leads** in the left menu. Your list of leads displays.
2. Click **Conversion Report** at the top menu.



a. **Date Range:** Select to filter the leads to be included in the report.

b. **Calculated by:** Select how the date for the leads is determined for the report, either by the lead created date or the lead status changed date.

c. **Group dates by:** Select how the dates are grouped in the report.

d. If this is checked, leads will be included even if they skipped a step in your lead status order (see “e.” below).

e. **Set Lead Status Order:** Click and drag the lead statuses into the order based on your lead management process.

f. **Group by:** Determines how the data will be displayed (grouped) by column in the report. Any custom fields you have for leads can be selected to display as a subgroup in the report. Lead source is the default.

g. **Ratios:** Choose one or more ratios you want calculated. Click the three dots to add another ratio.

h. **Save changes:** Click to save your configuration.
i. **View the report:** Click to open the report within Smartcare.
j. **Download the report:** Click to save to your computer as an Excel file.

Send Batch Email to Leads

1. Click **Messaging** in the left menu. The Messages window opens.
2. Click the three dots at the top right and select **Send a plain mail**.
3. Click the **plus** icon to the right of the To field and select **Leads**.
4. Click the drop-down arrows to select the filters to apply to the group of recipients. Click the check mark at the top right when finished selecting.
5. Enter a subject.
6. Click **Drop file or click to browse** to add an image or document if desired.
7. Enter the message and click **Send**.

Reporting

View and Print Reports

Note that the reporting framework (layout) is being updated. Some reports will have a new look. Instructions below are for current reports not yet updated to the new framework.

1. Click **Reporting** in the left menu. A list of reports opens.
2. Click the **filter** icon at the top right to sort the reports by Category or by Favorites.
3. Click on the desired report.
4. Enter the information and click **Run Report**.
5. Click the three dots and select **Download report**.
6. Select either **Excel** or **PDF** and print the reports using the print function within those applications.

Sort and Print Reports By Group

1. Click **Reporting** in the left menu. A list of reports opens.
2. Click on the desired report.
3. Enter the information and click **Run Report**.
4. Click and drag the group header you would like to sort by to the "drop here to group by that column."
5. Click the three dots and select **Download report**.
6. Select **Create Separate Page for Each Group**.
7. Select either **Excel** or **PDF** and print the reports using the print function within those applications.

Mark a Report as Favorite

1. Click **Reporting** in the left menu. A list of reports opens.
2. Locate the report and click the star to the right of the report to mark it as a favorite. Smartcare will remember your favorite reports even when you log out.