



Smartcare Reporting Refresh Quick Reference Guide

Reporting Refresh Quick Reference Guide

Old Report	New Report	Filter / Sorting / Grouping Edits
Child Allergies	Child Allergies	Customize the new framework Child Allergies report by toggling OFF Show Notes under Options . Click 'Refresh Report' to see the changes.
Children with Allergies by Classroom		Customize the Child Allergies report by toggling ON Report Grouping under Grouping . By default, Class will be selected. Click 'Refresh Report' to see the changes.
Child Attendance w/ Signature - 1 Child per Page	Child Attendance List	Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Add Signature Line under Options . Toggle ON Page Break per Group under Grouping . Click 'Refresh Report' to see the changes.
Child Attendance with Signature		Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Add Signature Line under Options . Click 'Refresh Report' to see the changes.
Child Time Card		Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Daily Overtime Threshold under Options . Set the desired OT threshold. Click 'Refresh Report' to see the changes.

Old Report	New Report	Filter / Sorting / Grouping Edits
Children Currently Signed In	Child Attendance List	<p>Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Attendance Type under Filters. Select Class. Toggle ON Child Currently Signed In under Filters. Toggle ON Show Child Name under Options. Under Report Grouping, remove the Child selection and select Class. Click 'Refresh Report' to see the changes.</p> <p>Note: When selecting the date range, the current date can be chosen under both Start and End to view children that are signed in for the day.</p>
Classroom Attendance Summary by Child		<p>Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Child under Filters. Select the child. Click 'Refresh Report' to see the changes.</p>
Daily Center Attendance		<p>Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Under Report Grouping, remove the Child selection and select Class. Click 'Refresh Report' to see the changes.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Daily Classroom Attendance Summary	Child Attendance List	Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Show Child Name and Show Birth Date under Options . Under Report Grouping , remove the Child selection and select Class . Click 'Refresh Report' to see the changes.
Daily Classroom Attendance Summary by Child		Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Child under Filters . Select the child. Under Report Grouping , remove the Child selection and select Class . Click 'Refresh Report' to see the changes.
Daily Classroom Attendance Summary by Classroom		Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Class under Filters . Select the class. Under Report Grouping , remove the Child selection and select Class . Click 'Refresh Report' to see the changes.
Daily Classroom Sign In/Sign Out		Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Click 'Refresh Report' to see the changes.
Daily Classroom Sign In/Sign Out – Total Hours		Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Under Report Grouping , remove the Child selection and select Class . Click 'Refresh Report' to see the changes.

Old Report	New Report	Filter / Sorting / Grouping Edits
Daily Facility Sign In/Sign Out	Child Attendance List	<p>Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Attendance Type under Filters. Select Class. Toggle ON Show Birth Date under Options. Toggle OFF Show Class under Options. Click 'Refresh Report' to see the changes.</p>
Individual Attendance for Children		<p>Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Toggle ON Attendance Type under Filters. Select Class. Toggle ON Child under Filters. Select the child. Toggle ON Show Birth Date under Options. Toggle OFF Report Grouping under Grouping. Click 'Refresh Report' to see the changes.</p>
Monthly Classroom Sign In Count by Child		<p>Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Click 'Refresh Report' to see the changes.</p> <p>Note: You will see Class Count with the number of times the child was in the class next to it, located at the bottom of each child's attendance summary.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Total Daily Attendance with Hours	Child Attendance List	<p>Customize the Child Attendance List report by choosing the Start and End dates within the Date Range. Under Report Grouping, remove the Child selection and select In Date. Toggling OFF Expand Details. Click 'Refresh Report' to see the changes.</p> <p>Note: The total children in attendance + total hours of attendance will be available at the bottom of each date's summary. The grand total within the date range for total children in attendance + total hours of attendance will be available on the last page.</p>
Account Email & Phone Number Summary	Child Enrollment Confirmation	<p>Note: In the Child Enrollment Confirmation report, you will see the relevant data under Family Information. The data is grouped by the last name of the child, by default.</p>
Account Information Sheet		<p>Customize the Child Enrollment Confirmation report by toggling OFF the Show Signature Line under Options. Click 'Refresh Report' to see the changes.</p>
Address & Contact Information Summary - All (Enrolled + Unenrolled)		<p>Customize the Child Enrollment Confirmation report by toggling ON Enrollment Status under Filters. Select the Enrolled and Unenrolled enrollment statuses. Toggle OFF the Show Signature Line under Options. Click 'Refresh Report' to see the changes.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Address & Contact Information Summary - Enrolled Only	Child Enrollment Confirmation	Customize the Child Enrollment Confirmation report by toggling ON Enrollment Status under Filters . Select the Enrolled enrollment status. Toggle OFF the Show Signature Line under Options . Click 'Refresh Report' to see the changes.
Authorized Pickup Person		Note: In the Child Enrollment Confirmation report, you will see the relevant data under Family Information . The data is grouped by the last name of the child, by default.
Child Information Sheet		Customize the Child Enrollment Confirmation report by toggling ON Last Physical under Options . Toggle OFF the Show Signature Line under Options . Click 'Refresh Report' to see the changes.
Child Information Sheet by Individual Child - All (Enrolled + Unenrolled)		Customize the Child Enrollment Confirmation report by toggling ON Enrollment Status under Filters . Select the Enrolled and Unenrolled enrollment statuses. Toggle ON Child under Filters . Select the child. Toggle ON Last Physical under Options . Toggle OFF the Show Signature Line under Options . Click 'Refresh Report' to see the changes. Note: The Child Enrollment Confirmation report also allows the selection of custom enrollment statuses under the Enrollment Status filter.

Old Report	New Report	Filter / Sorting / Grouping Edits
Child Information Sheet by Individual Child - Enrolled Only	Child Enrollment Confirmation	<p>Customize the Child Enrollment Confirmation report by toggling ON Enrollment Status under Filters. Select the Enrolled enrollment status. Toggle ON Child under Filters. Select the child. Toggle ON Last Physical under Options. Toggle OFF the Show Signature Line under Options. Click 'Refresh Report' to see the changes.</p> <p>Note: The Child Enrollment Confirmation report also allows the selection of custom enrollment statuses under the Enrollment Status filter.</p>
Child Location	Child Location	<p>Note: The old report was migrated to the new framework as is. No customizations needed.</p>
Classroom Sign In/Sign Out	Child Sign In Sheet (Weekly)	<p>Customize the Child Sign In Sheet (Weekly) report by selecting Default Class under Separate Pages By. Click 'Refresh Report' to see the changes.</p>
Weekly Classroom Sign In/Sign Out Form		<p>Customize the Child Sign In Sheet (Weekly) report by selecting Default Class under Separate Pages By. If needed, under Options, Show Signature can be toggled OFF to remove the signature field. Click 'Refresh Report' to see the changes.</p>
Child Roster	Children List	<p>Customize the Children List (With Custom Fields) report by toggling ON Report Grouping under Grouping. Select Class. Click 'Refresh Report' to see the changes.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Child Roster with Contact Info	Children List	Customize the Children List (With Custom Fields) report by toggling ON Show Age In Years, Show Primary Phone, Show Email, and Show Address under Options . Click 'Refresh Report' to see the changes.
Child Roster with Contact Info by Classroom		Customize the Children List (With Custom Fields) report by toggling ON Show Age In Years, Show Primary Phone, Show Email, and Show Address under Options . Toggle ON Report Grouping under Grouping . Select Class . Click 'Refresh Report' to see the changes.
Children DOB with Ages by Classroom		Customize the Children List (With Custom Fields) report by toggling ON Show Age In Years under Options . Toggle OFF Show Account Holder, Show Class, Show Enrollment Status, and Show Enrollment Date under Options . Toggle ON Report Grouping under Grouping . Select Class . Click 'Refresh Report' to see the changes.
Enrolled Children by Classroom		Customize the Children List (With Custom Fields) report by toggling ON Report Grouping under Grouping . Select Class . Click 'Refresh Report' to see the changes. Note: The Children List (With Custom Fields) report will show enrolled children by default under Filters . This filter can be turned off if needed.

Old Report	New Report	Filter / Sorting / Grouping Edits
Enrolled Children by Classroom Filtered	Children List	<p>Customize the Children List (With Custom Fields) report by toggling ON Class under Filters. Select the class. Toggle ON Enrollment Status under Filters. Select Enrolled. Toggle ON Show Age In Years under Options. Toggle ON Report Grouping under Grouping. Select Class. Click 'Refresh Report' to see the changes.</p> <p>Note: The summary for the class count will be located at the bottom of the page labeled as COUNT with a number next to it.</p>
Enrollment Status Summary		<p>Customize the Children List (With Custom Fields) report by toggling OFF Only Show Enrolled Children under Filters. Toggle ON Report Grouping under Grouping. Select Enrollment Status under Report Grouping. Click 'Refresh Report' to see the changes.</p>
IEF Expiration Date by Month		<p>Customize the Children List (With Custom Fields) report by toggling ON Show Income Eligibility Form Expiration Date under Options. Click 'Refresh Report' to see the changes.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Deposit Summary	Deposit Summary	<p>Customize the new framework Deposit Summary report by choosing the Start and End dates within the Date Range. Click 'Refresh Report' to see the changes.</p> <p>Note: Each column will have a total at the very bottom of the page.</p>
Emergency Contacts	Emergency Contacts And Medical Providers	<p>Note: If a child has a doctor added on their Medical page, you will see the doctor's name and phone number below Contacts — it will be a section labeled as Medical Providers.</p>
Emergency Contacts by Classroom		<p>Customize the Emergency Contacts And Medical Providers report by toggling ON Separate by Default Class under Options. Click 'Refresh Report' to see the changes.</p>
Employee Time Card Daily Summary	Employee Time Card	<p>Customize the Employee Time Card report by choosing the Start and End dates within the Date Range. If needed, under Options, Show Employee Signature can be toggled OFF to remove the signature field. Click 'Refresh Report' to see the changes.</p> <p>Note: The Employee Time Card report separates each employee by page, by default.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Employee Time Card Summary	Employee Time Card	<p>Customize the Employee Time Card report by choosing the Start and End dates within the Date Range. If needed, under Options, Show Employee Signature can be toggled OFF to remove the signature field. Click 'Refresh Report' to see the changes.</p> <p>Note: The Employee Time Card report separates each employee by page, by default.</p>
Time Card		<p>Customize the Employee Time Card report by choosing the Start and End dates within the Date Range. Toggle ON Show Week Number under Options. Click 'Refresh Report' to see the changes.</p>
Time Card - OT at 40 Hrs		<p>Customize the Employee Time Card report by choosing the Start and End dates within the Date Range. Toggle ON Show Week Number under Options. Click 'Refresh Report' to see the changes.</p> <p>Note: The Employee Time Card report has the Weekly Overtime Threshold set to 40 by default.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Time Card – OT at 8 hours/day	Employee Time Card	<p>Customize the Employee Time Card report by choosing the Start and End dates within the Date Range. Under Options, toggle OFF the Weekly Overtime Threshold. Then toggle ON the Daily Overtime Threshold. Make sure it's set to 8. If needed, under Options, Show Employee Signature can be toggled OFF to remove the signature field. Click 'Refresh Report' to see the changes.</p> <p>Note: The Employee Time Card report separates each employee by page, by default.</p>
Time Card by Employee		<p>Customize the Employee Time Card report by choosing the Start and End dates within the Date Range. Toggle ON Employee under Filters. Select the employee. Toggle ON Show Week Number under Options. Click 'Refresh Report' to see the changes.</p>
Time Card by Employee - OT at 40 Hrs		<p>Customize the Employee Time Card report by choosing the Start and End dates within the Date Range. Toggle ON Employee under Filters. Select the employee. Toggle ON Show Week Number under Options. Click 'Refresh Report' to see the changes.</p> <p>Note: The Employee Time Card report has the Weekly Overtime Threshold set to 40 by default.</p>

Old Report	New Report	Filter / Sorting / Grouping Edits
Immunization Record	Immunizations	Customize the Immunizations report by toggling ON Show Class under Options . Click 'Refresh Report' to see the changes.
Overdue Immunizations		Customize the Immunizations report by toggling ON Overdue Immunizations under Filters . Select Yes . Click 'Refresh Report' to see the changes.
Payroll Summary	Payroll List	Customize the Payroll List report by choosing the Start and End dates within the Date Range. Toggle ON Show SSN Last Four under Options . Click 'Refresh Report' to see the changes.
Monthly Roll Call by Class	Roll Call	Note: The old report was migrated to the new framework with a new name of Roll Call . It will now list all classes and is grouped by class, by default. If needed, toggling ON Page Break per Group under Grouping then clicking 'Refresh Report' will separate each class' data by page. The Default Class filter can also be used to view specific classes.
Timeline Entries by Child	Timeline List	Customize the Timeline List report by choosing the Start and End dates within the Date Range. Toggle ON Child under Filters . Select the child. Click 'Refresh Report' to see the changes.

Old Report	New Report	Filter / Sorting / Grouping Edits
Timeline Entries by Type	Timeline List	Customize the Timeline List report by choosing the Start and End dates within the Date Range. Toggle ON Timeline Entry Type under Filters . Select the timeline entry type. Click 'Refresh Report' to see the changes.
Accounting Master Ledger	Transaction List	Customize the Transaction List report by choosing the Start and End dates within the Date Range. Toggle ON Show Accounting Code and Show GL Account under Options . Click 'Refresh Report' to see the changes.
Standard Family Account Transactions - All Active Families		Customize the Transaction List report by choosing the Start and End dates within the Date Range. Toggle ON Show Manual Note under Options . Toggle ON Report Grouping under Grouping . Select Account . Click 'Refresh Report' to see the changes.
Standard Family Account Transactions by Family		Customize the Transaction List report by choosing the Start and End dates within the Date Range. Toggle ON Account Owner under Filters . Select the parent. Toggle ON Show Manual Note under Options . Click 'Refresh Report' to see the changes.