Smartcare™
Leading Edge for Early Learning

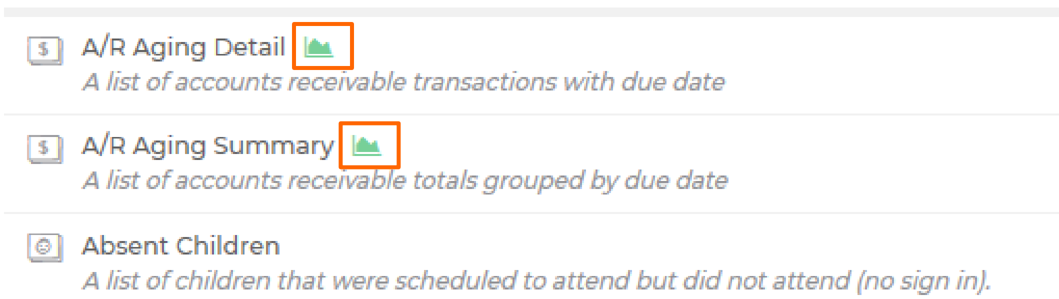
Most Common Reports Quick Reference Guide

Contents

Reporting

View and Print Reports

Note that the reporting framework (layout) is being updated. Some reports will have a new look. Reports marked with the icon below display the new framework.

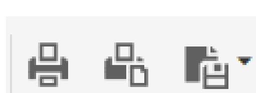


Instructions for framework not yet updated:

1. Log into the Smartcare Web Portal.
2. Click **Reporting** in the left menu. A list of reports opens.
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.

Instructions for new framework:

1. Log into the Smartcare Web Portal.
2. Click **Reporting** in the left menu. A list of reports opens.
3. Click on the desired report.
4. Select the filters in the left column.
5. Click **Refresh Report** to view data based on the filters you selected.
6. Click on a print or export icon above the report window to print or download the report.



- Print the entire report
- Print the page
- Export the report into a different format such as PDF or Excel.

Sort and Print Reports By Group

Some reports can be sorted and printed by group. This applies to reports with the framework not yet updated:

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**. A Download window displays.
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.

Report Descriptions

The following reports are the most commonly used within Smartcare. For a complete list of reports, please refer to the Smartcare Reporting User Guide.

Address & Contact Information Summary – Enrolled Only

Purpose

- A list of enrolled children and the addresses and phone numbers of the parents in the family.

Fields

- Parent Name – Name of first parent listed in the family.
- Relationship – relationship of person listed above to the child.
- Child's Name – Name of the child.
- Address1 – address of the parent.
- City – the city associated with the address.
- State – the state associated with the address.
- Zip Code – the zip code associated with the address.
- Parent Phone – phone number of the parent.
- Class – default class of the child.
- Child Gender – gender of the child.
- Birth Date – child's birth date.
- Child's Age – age of the child in years and months.

Notes

- This report only includes children that are enrolled.

Balance Summary

Purpose

- Allows the user to see the current balance of all accounts that have a balance.

Filters

- Balance, Account Owner

Options

- Show Total Balance (On by Default)

Fields

- Full Name – Name of the account owner.
- Balance – Current balance of the account.

Notes

- This is a customizable report with filters and options to view specific data elements.
- After making any customizations, always click **Refresh Report** next to "Filters" to view the changes.

Child Allergies

Purpose

- A printed version of children with allergies and the treatment steps. Useful to have in an emergency binder.

Filters

- Allergy Type, Allergy Severity, Class, Child, Treatment

Fields

- Child – First and last name of the child.
- Class – The child's default class assignment.
- Allergy – This column will list the allergies pertaining to each child.
- Severity – An indication of how severe the allergy is.
- Treatment – Any treatments to the allergy will be listed in this column.

Notes

- This is a customizable report with filters and options to view specific data elements.
- After making any customizations, always click **Refresh Report** next to "Filters" to view the changes.

Child Time Card

Purpose

- A record of the child's attendance at the center for a selected date range. Can be used as a printed record for parent verification.

Filter

- Date Range

Grouping

- Child

Fields

- Child – child's last name, first name.
- Date In – date the child was checked in.
- Time In – time the child was checked in.
- Checked in By – person that dropped off the child.
- Date Out – date child was checked out.
- Time Out – time the child was checked out.
- Checked Out By – person that picked the child up.
- Hours – number of hours the child was checked into the center in hour format.
- Hours HH.MM – number of hours the child was checked into the center in decimal format.
- Classroom – classroom the child was checked into in the teacher app.
- Overtime – amount of time child is in attendance over 10 hours in a day. This was a request for a specific center.

Children Currently Signed In

Purpose

- List of children currently signed into the center. Can be used to verify manual head counts.

Grouping

- Classroom

Fields

- Classroom – classroom assigned as the child's default in the child's profile.
- Child's Name – child's first and last name.
- Signed In By – the name of the person that signed the child in.
- Date In – date the child was signed in.
- Time In – time the child was signed into the center.
- Total Time – total amount of time the child has been signed into the center as of when the report was run.

Children Custom Fields

Purpose

- A list of all the children their primary guardian, contact info and all the custom fields

Fields

- Class Name – child's default class assignment.
- Child Name – name of the child.
- Parent Name – name of the first parent in the family.
- Mobile Number – mobile phone number of the parent listed.
- Email Address – email address of the parent listed.
- Address – Street address of the parent listed.
- Date of Birth – the child's date of birth.
- Child Age – child's age in years and months.
- Enrolled Date – date the child last had a status of enrolled.
- Custom Field – the first custom field entered and the value in that field.
- There will be as many custom field columns as there are custom fields for children in the center.

Notes

- This report is only available in Excel. We don't know how many custom fields there will be at any center, so the report cannot be exported as a PDF from the system. The report can be printed as a PDF from Excel.

Daily Center Attendance

Purpose

- A general record of children's attendance at the center. This report can be used to see how many hours of total attendance have occurred in the center.

Filter

- Date

Grouping

- Class Name

Fields

- Class Name – class the child was first checked into in the center.
- Child Name – first and last name of the child.
- Sign In Time – time that the child was checked in.
- Signed in By – name of the person that signed the child in.
- Sign Out Time – time the child was checked out.
- Signed Out by – name of the person that signed the child out.
- Total Time – the total hours and minutes the child was checked in.

Notes

- This report will only show the first class the child was checked into for the day. For a report that shows all the classrooms the child was in during the day please run the Daily Class Attendance Summary.

Deposit Detail

Purpose

- List of the payments made on a specific date (or range of dates) including the Payer Name, Payment Type, and Payment Amount.

Filter

- Date Range

Grouping

- Payment Date

Fields

- Payment Date – date the payment was entered in the system
- Payer Name – name of the person that made the payment
- Payment Type – tender of the payment (Cash, Check, Money Order, or Remittance)
- Amount – payment total

Deposit Summary

Purpose

- The Deposit Summary report provides a list of payments separated by type and aggregated by day.

Filters

- Date Range

Options

- Include Remittance Amount (On by Default), Include ACH, Include Credit Card, Include Agency Payments (On by Default), Include Cash (On by Default), Include Money Order (On by Default), Include Check (On by Default), Include Other Payments (On by Default), Show Total Deposit (On by Default), Subtract Voids (On by Default), Subtract Failed Payments (On by Default), Subtract Refunds (On by Default)

Fields

- Payment Date – The date of the payment.
- Agency – Dollar amount of the agency payment.
- Cash – Dollar amount of the cash payment.
- Money Order – Dollar amount of the money order payment.
- Check – Dollar amount of the check payment.
- Other – Dollar amount of the payment marked as Other.
- Remittance – Dollar amount of the remittance payment.
- Total Deposit – The deposit total for each specific date within the date range selected.
- Report Total – The grand total for each column.

Notes

- This is a customizable report with filters and options to view specific data elements.
- After making any customizations, always click **Refresh Report** next to "Filters" to view the changes.

Employee Custom Fields

Purpose

- A list of all the employees, their assigned roles, contact info, and all the custom fields.

Fields

- Employee Name – The full name of the employee.
- Primary Number – Their primary phone number.
- Email Address – The email address attached to their profile in the system.
- Address – The full physical mailing address for the employee.
- Roles – The Smartcare User Role assigned to them. (i.e. Teacher)
- There will be as many custom field columns as there are custom fields for employees in the center.

Notes

- This report is only available in Excel. We don't know how many custom fields there will be at any center, so the report cannot be exported as a PDF from the system. The report can be printed as a PDF from Excel.

Employee Time Card

Purpose

- The Employee Time Card report provides a list of employees and their daily clock-in and out times. There is also a place for a supervisor verification signature and option to define your overtime criteria regardless of when the pay period starts.

Filters

- Date Employee Entered, Date Range (Default Range: Sun to Sat), Employee, Employee Position, Employment Type, Salary Type

Options

- Week Start Day → Same as Start Day (Selected by Default), Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
- Weekly Overtime Threshold → 40 (Selected by Default)
- Daily Overtime Threshold
- Time Format → Decimal Hours (Selected by Default), Hours : Minutes
- Show Employee Signature (On by Default), Custom Footer Message

Fields

- Employee's Name (Default Grouping) – The last and first name of the employee.
- Date – The date and day of the week.
- Week Starting – The date that the week starts, by default this would be the Sunday.
- Position – The assigned position for the employee.
- In – The time that the employee clocked in for the day.
- Out – The time that the employee clocked out for the day.
- Regular – The number of regular hours worked.
- Overtime – The number of overtime hours worked.
- Total – The total hours of the day.
- Employee Total – The total of regular hours, overtime hours, and overall hours for the date range selected.

Notes

- This is a customizable report with filters and options to view specific data elements.
- After making any customizations, always click **Refresh Report** next to "Filters" to view the changes.

Payments

Purpose

- A list of payments made within a selected time period. This report can be used to verify if a parent has made a payment or if the payment has been entered in the system.

Filter

- Date Range

Grouping

- Method

Fields

- Payor – name of the person that made the payment.
- Account – name of the account owner.
- Date – date the payment was entered in the system.
- Time – time the payment was entered in the system.
- Amount – amount of the payment.
- Method – payment method ACH, CC, Cash, Check or Money Order.
- Email Receipt – email address the receipt was sent to.
- System Notes – system notes for the payment showing the last 4 digits of the account number, the check number of the payment. Or the money order number.
- Manual Note – note entered by a user at the time of payment processing.
- Family Name – name of the family the account owner is in.

Payments and Fees

Purpose

- A summary of payments and fees processed within the date range specified.

Filter

- Date Range

Grouping

- Type

Fields

- Name – type of Fee (ACH, NSF, or Tech) or Payment (ACH, Credit Card, Cash, Check, Money Order, or Misc Credits)
- Type – either Fee or Payment (this is the default grouping for the report)
- Start Date – the first date in the reporting period
- End Date – the last date in the reporting period
- Nr of Items – count of transactions for each Fee or Payment Name
- Payment Amount – sum of payments for each Payment Name
- Fee Amount – sum of fees for each Fee Name

Standard Customer Statement by Payer

Purpose

- A listing of charges, credits and payments applied to a selected account. This report can be given to the account owner if they deleted the statement that was emailed to them.

Filters

- Payer Name
- Date Range

Grouping

- Payer

Fields

- Payer – name of the account owner.
- Post Date – date the item was posted to the account.
- Description – a description of the charge or discount.
- Comment – system generated comment from the item.
- Credit – amount of the credit or $0 if the item is a charge.
- Charge – amount of the charge or $0 if the item is a credit.
- Balance – running balance of the account.
- Child Name – name of the child the charge is associated with.

Notes

- This report will only include data that is in closed statements. Items that are in recent activity will not display in this report.

Standard Family Account Transactions by Family

Purpose

- A listing of all charges, credits and payments applied to an individual account including recent activity. This report is used as a current statement for someone that is not an account owner. This report is also useful for parents that need a report for an FSA.

Filters

- Account Owner
- Date Range

Grouping

- Account

Fields

- Account – name of the account owner.
- Date – date the item was applied to the account.
- System Notes – system generated note for the item including the last for digits of the account or the checking number.
- Manual Note – note entered by a user at the time of payment processing.
- Charges – amount of the charge or $0 if the item is a credit.
- Credits – amount of the credit or $0 if the item is a charge.
- Balance – running balance of the account.

Contact Us

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