



Enterprise Web Portal User Guide

Welcome

We are pleased you have chosen to partner with us to help you easily navigate the day-to-day business of managing your childcare centers. 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 Enterprise Web Portal and get to know some of the features that will help you easily manage your centers. 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: enterprisesupport@smartcare.com

Contents

Log In	1
Reset Your Password	1
Enterprise Web Portal	1
Enterprise Dashboard	1
Create a New Dashboard	2
Edit a Dashboard Name	2
Delete a Dashboard	3
Add a Widget to a Dashboard	3
Delete a Widget From the Dashboard	3
Leads.....	3
Transfer Leads From One Center to Another	3
Online Enrollment Settings	4
Enable Organizations and Centers to Configure Online Enrollment Settings.....	4
Configure Custom Online Enrollment Settings For an Organization or Center.....	4
Add Enrollments.....	5
Settings	6
Parent Info.....	6
Child Info	7
Acknowledgements.....	7
Documents.....	7
Payments.....	8
View Enrollments	8
View Documents.....	8
Org Management.....	9
Allow Your Organizations to Create Settings.....	9
Manage Settings for Your Centers	9
Edit a Setting	9
Manage Organizations.....	10
Add a New Organization.....	10
Rename an Organization	10
Move an Organization	10

Remove an Organization.....	10
Center Web Portal	11
My Center	11
Set Up My Center	12
Center Information	12
Set Up Buildings	13
Set Up Classes	14
Set Up Schools.....	14
Set Up Meal Plans	15
Set Child Statuses.....	15
Delete Child Status	15
Touchless Check In/Out	16
Set Up Message Templates.....	17
Delete Message Template.....	17
Set Up User Roles.....	18
Manage Custom Fields	22
Manage Tags	23
Set Up Immunizations	24
Center Settings.....	25
Change Password	26
Change Email	26
Download Smartcare Apps.....	27
Log Out	27
Center Dashboard	28
Current Ratios	28
Signed In	29
Birthdays.....	29
Enrolled Children	30
New Faces	30
Manage Child & Family Data	31
Manage Families.....	31
Search and Sort Families List	31

Add a Family	32
Add a Person to a Family Record	33
Add a Parent or Guardian as a Pickup Person	33
Manage Family Notes.....	34
Add a Family Note	34
Edit a Family Note.....	34
Delete a Family Note.....	34
Manage Family Documents.....	35
Add a Document to a Family's Record.....	35
Edit a Document's Name or Notes on a Family's Record.....	35
Delete a Document on a Family's Record.....	35
Archive a Family Record	35
Restore a Family Record from the Archive	36
Children.....	36
Search and Sort Children List	36
Perform Bulk Actions Using Children List	37
View Bulk Actions.....	38
Assign a Classroom to a Child	39
Add a Photo to a Child Profile.....	39
View, Add or Edit Attendance for a Child	39
Assign a School to a Child	40
Add Transportation or Bus Run to a Child's Profile	41
Add a Food Program to a Child's Profile.....	41
Add a Child's Schedule	42
Edit a Child's Schedule	44
Delete a Child's Schedule	44
Enter a Child's Medical Information	44
Enter a Child's Immunizations	45
Enter a Child's Allergies.....	46
Select the Child Status on a Child's Profile	46
Add Emergency Contact	46
Manage Child Notes	47

Add a Child Note	47
Edit a Child Note.....	47
Delete a Child Note	47
Manage Child Documents.....	47
Add a Document to a Child's Profile	47
Edit a Document's Name or Notes on a Child's Profile	48
Delete a Document on a Child's Profile	48
Archive a Child's Record.....	49
Restore a Child Record from the Archive.....	49
Adults	49
Update Parent / Guardian Email	49
Resend Verification Code to a Parent/Guardian.....	50
Reset Password for a Parent/Guardian	50
Reset PIN for a Parent/Guardian.....	51
Enter Payment Method For Parent/Guardian	51
Enable Autopay.....	52
Change Secondary Account Owner to Primary	53
Manage Adult Notes	55
Add a Note to an Adult's Profile	55
Edit an Adult Note	55
Delete an Adult Note	56
Manage Adult Documents	56
Add a Document to an Adult's Profile	56
Edit a Document's Name or Notes on an Adult's Profile	56
Delete a Document on an Adult's Profile	56
Archive an Adult's Record	57
Restore an Adult Record from the Archive	57
Enrollments	58
Enrollments Dashboard.....	58
Configure Online Enrollment	59
Add New Enrollment Configuration.....	59
Settings	60

Parent Info	60
Child Info	61
Acknowledgements	62
Documents	62
Payments	63
Set Enrollment Capacity	64
Add an Enrollment Capacity	64
Delete an Enrollment Capacity	64
Send Enrollment Invitation	65
Change Enrollment Status	65
Scheduling	66
View Schedule	66
Add a Schedule	67
Edit a Schedule	67
Delete a Schedule	68
Scheduling Templates	68
Add a Schedule Template	68
Add Children to a Schedule Template	68
Add Employees to a Schedule Template	69
Edit a Schedule Template	69
Delete a Schedule Template	69
Timeline	70
View the Timeline	70
Approve or Reject a Timeline Entry	71
Messaging	72
Send a Message To Specific Individuals	72
Send a Message To a Group	73
Use Merge Fields in Messaging	74
Send a Text Message To Specific Individuals	75
Send a Text Message To a Group	76
View Sent Text Messages	76
Manage Employees	77

Search and Sort Employee List.....	77
Add an Employee	78
Add an Employee Schedule	79
Edit an Employee Schedule.....	80
Delete an Employee Schedule	80
Add or Change a User Role on an Employee Record.....	80
Add a Position to an Employee Record.....	81
Add Medical Information to an Employee Record	81
Resend Registration Email to an Employee	82
Payroll.....	82
Manage Employee Time Off	83
Add Time Off Option	83
Edit Time Off Option	83
Delete Time Off Option	83
Manually Add / Remove Time Off on Employee Time Sheet.....	84
Add a Time Off Event to an Employee Schedule	84
View or Edit Time Sheet for an Employee	85
Manage Employee Notes	86
Add an Employee Note	86
Edit an Employee Note	86
Delete an Employee Note	86
Manage Employee Documents	87
Add a Document to an Employee's Profile	87
Edit a Document's Name or Notes on an Employee's Profile	87
Delete a Document on an Employee's Profile	87
Archive an Employee Record.....	87
Restore an Employee Record from the Archive	88
Billing	89
Set Up Accounting Codes.....	89
Edit or Delete Accounting Codes	89
Set Up the Billing Schedule	90
Set Up Tuition Plans.....	91
Set Up Flat Fee Tuition Plan	91

Set Up Attendance-Based Billing Plan	92
Change Tuition Rate	92
Add New Tuition Rate for Future Billing Cycle	93
Delete a Tuition Plan.....	93
Set Up Child Billing Plan	94
Change a Tuition Plan On a Child's Profile.....	94
Remove a Tuition Plan from a Child's Profile	95
Add a Subsidy / Agency Account	95
Add Agency Billing to a Child's Profile	95
Add Split Billing to a Child's Profile	96
Add Dollar Amount Split for Attendance-Based Billing Plan	97
Set Up Recurring Discounts.....	97
Apply Recurring Discounts	98
Set Up Conditional Billing.....	98
Set Up Early Drop Off Fee.....	98
Set Up Late Pickup Fee	99
Set Up Late Payment Fee	99
Accounting.....	100
Search and Sort Accounts List	100
View Transaction Activity	100
Donations	101
Require Auto-Pay.....	102
Enter a Manual Charge	103
Assign a Manual Charge as Tuition.....	103
Assign a Manual Charge to Children	103
Initiate an Invoice Now	104
Enter a Manual Credit.....	104
Allocate a Credit Manually	105
Edit Allocations	105
Download and/or Print a Receipt.....	106
Process a Refund	107
Void a Payment.....	111
View Remittances.....	111

View Billing Status.....	112
View Calendar for Billing Dates	113
Resend a Statement.....	113
Download or Send Tax Statements	114
Email or Download Bulk Tax Statements	114
Agency Ledgers	115
View Agency Ledgers	115
Add a Charge to an Agency Ledger	115
Add Credit to a Charge on an Agency Ledger	116
Transfer a Balance From an Agency Ledger	116
Void a Charge or a Credit on an Agency Ledger	116
Add a Remittance for Agency Ledgers	117
Modify Revenue Date for Agency Payment.....	117
Payments	118
Process a Payment	118
Allocate a Payment Manually.....	119
Online Payments	120
Lead Management	120
Capture Leads Through Your Website.....	120
Create Lead Statuses and Sources	121
Create a New Lead.....	121
View and Edit the Lead Record	122
Create Tasks for Leads	122
Add Lead Task to Calendar	123
Create Workflows for Leads	123
View Lead Conversion Report	125
Send Batch Email to Leads.....	126
Reporting.....	127
View and Print Reports.....	127
Sort and Print Reports By Group	127
Mark a Report as Favorite	127

Log In

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.

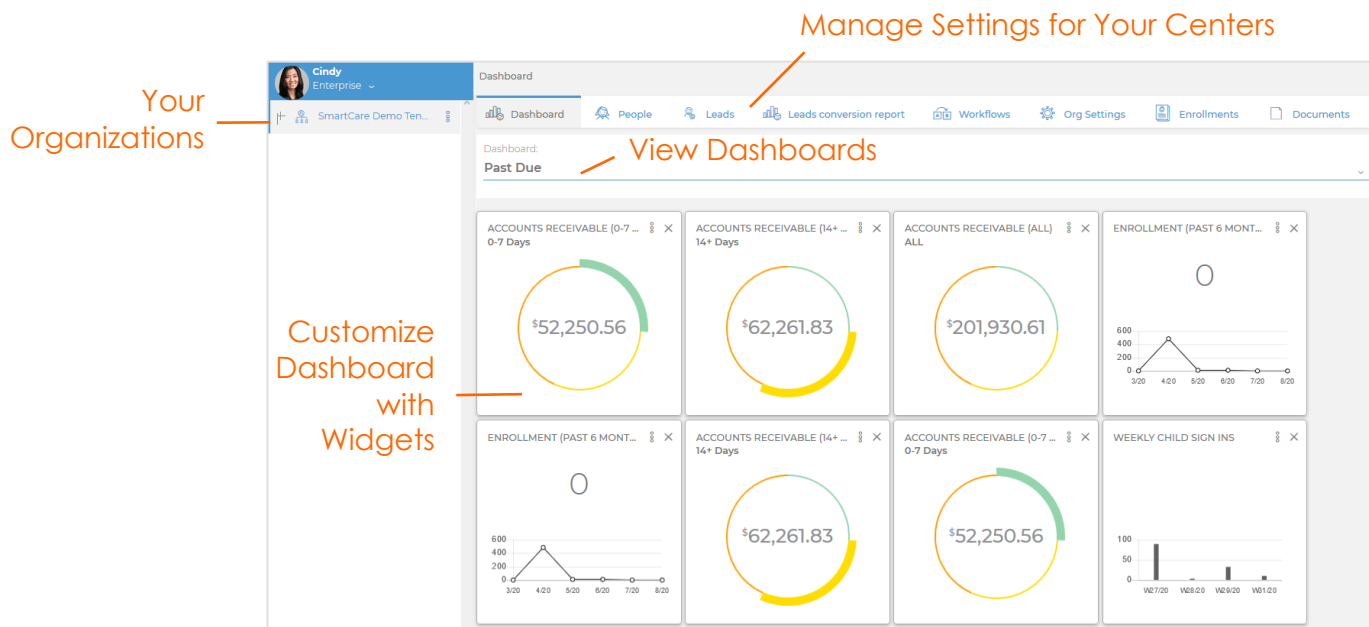
Reset Your Password

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

Enterprise Web Portal

Through the Enterprise Web Portal you can view customized dashboards and manage settings for your centers. You can also add or change organizations within your enterprise account.

Enterprise Dashboard

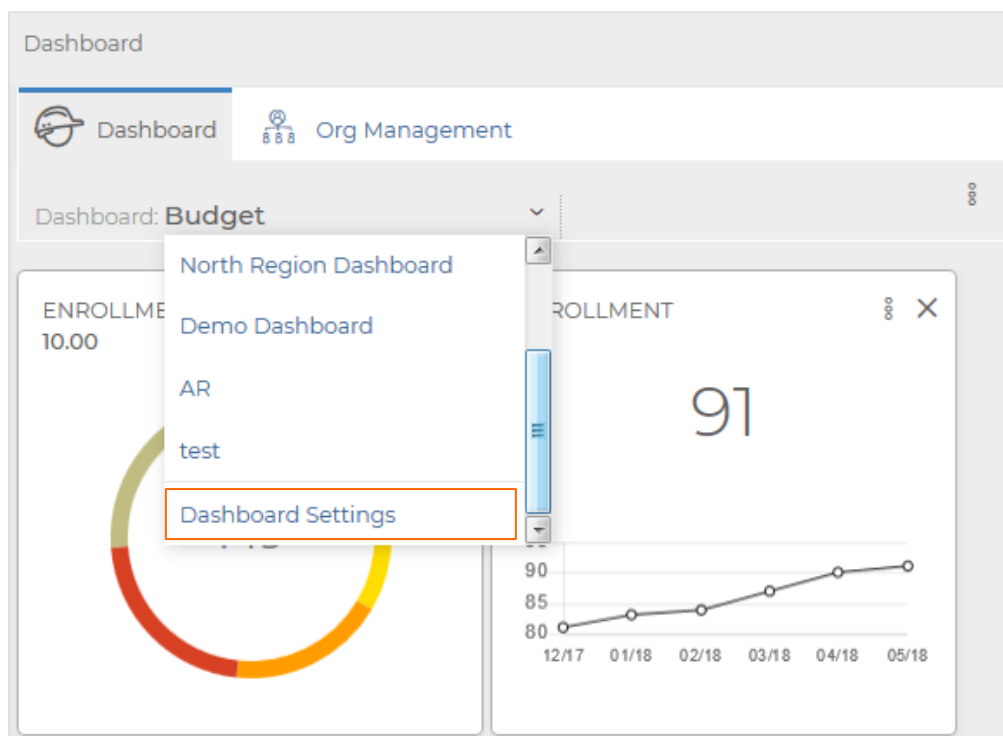


Create a New Dashboard

1. Click the **Dashboard** tab at the top.
2. Click the three dots at the top right and select **Add Dashboard**.
3. Enter a title for the Dashboard and click **OK**. A selection of widgets opens.
4. Click **Add** on a widget to add to this new Dashboard. The Dashboard has now been created and the widget added.

Edit a Dashboard Name

1. Click the **Dashboard** tab at the top.
2. Click the Dashboard drop-down list and scroll to, and select, **Dashboard Settings**. Dashboard Settings opens on the right.
3. Click the **edit** icon next to the Dashboard you want to change.
4. Enter a new title for the Dashboard and click **OK**.



Delete a Dashboard

1. Click the **Dashboard** tab at the top.
2. Click the Dashboard drop-down list and scroll to, then select, **Dashboard Settings**. Dashboard Settings opens on the right.
3. Click the **trash** icon next to the Dashboard you want to delete.
4. Click **OK** to confirm.

Add a Widget to a Dashboard

1. Click the **Dashboard** tab at the top.
2. Select a Dashboard from the Dashboard drop-down list.
3. Click the three dots at the top right and select **Add Widget**.
4. Enter a title for the Dashboard and click **OK**. A selection of widgets opens.
5. Click **Add** on a widget to add to your Dashboard.

Delete a Widget From the Dashboard

1. Click the **Dashboard** tab at the top.
2. Select a Dashboard from the Dashboard drop-down list.
3. Click the **X** at the top right of the widget you want to delete.
4. Click **OK** to confirm.

Leads

Transfer Leads From One Center to Another

1. Click the **Leads** tab at the top. Your list of leads opens.
2. Click on the drop-down arrow next to a center in the Center column and select the center you want to transfer the lead to. A confirmation window opens.
3. Select the Lead Status from the drop-down list.
4. Select the Lead Source from the drop-down list.
5. Click **Move Lead**.

Note: The Admin for the center where the lead is transferred will need to add an "Expected Class" and an "Expected Tuition Plan" to the lead after it is moved.

Online Enrollment Settings

The Online Enrollments feature must first be enabled by Smartcare. You can request this feature by contacting your Smartcare Customer Service Manager or emailing [Smartcare Enterprise Support](#).

Enrollment settings can be configured on either the enterprise, organization, or center level. In order for organizations and centers to configure their own enrollment settings, you must first enable them to do so. You can also customize enrollments for specific organizations and centers. For example, you may have the same enrollment for one organization but customize the enrollment URL for each center.

Enable Organizations and Centers to Configure Online Enrollment Settings

1. Click on the top level organization in the left menu. All organizations and centers under this level will be affected by the settings you make.
2. Click the **Org Settings** tab at the top menu. The Org Management window opens.
3. Scroll down and click **Enrollments** under Center Settings.
4. Click on an enrollment in the list to view details. If you there are no enrollments in the list, you must first add one. See [Add Enrollments](#).
5. Click on "Allow centers to manage their settings" to enable.
6. Click **Save Changes** at the bottom.

Configure Custom Online Enrollment Settings For an Organization or Center

1. Click on an organization or center in the left menu. All centers under an organization will be affected by the settings you make.
2. Click the **Org Settings** tab at the top menu. The Org Management window opens.
3. Scroll down and click **Enrollments** under Center Settings.
4. Click on an enrollment in the list to view details. If you there are no enrollments in the list, you must first add one. See [Add Enrollments](#).
5. Click on "Create custom settings for this organization."
6. Select the settings that apply and click on each configuration tab to customize. See [Add Enrollments](#).
7. Click **Save Changes** when finished.

Add Enrollments

You will only have to configure an online enrollment one time. After that you can make changes as needed.

1. Click on a top level organization in the left menu. All centers under this level will be affected by the settings you make.
2. Click the **Org Settings** tab at the top menu. The Org Management window opens.
3. Scroll down and click **Enrollments** under Center Settings.
4. Click the three dots at the top right and select **Add New Enrollment**.
5. Enter a name for the enrollment.
6. Add a URL address. This is the link where parents can enroll online.
7. Select a Start Date (and End Date if applicable).
8. Click **Continue**.
9. 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.

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.

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.

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 Plans**.
 - 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**.

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.
 - e. Click **Save Changes**.

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.

Payments

In the final step, select payment options for enrollees to complete. You can also add a deposit or registration fee.

Capture Auto-Pay Information

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

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 a name as you want it to display on the form.
 - e. Click **Save Changes**.

View Enrollments

This option enables you to view enrollments for all your centers. The list of enrollments can also be sorted using filters such as Application Status or Center, for example.

1. Click the **Enrollments** tab at the top. The list of enrollments displays.
2. To filter the list, click the **filter** icon at the top right and check all filters you want to apply. The list will sort automatically based on the filters you select.

View Documents

This option enables you to view documents for all your centers.

1. Click the **Documents** tab at the top. The list of documents displays.
2. You can sort the list of documents by clicking on any column header.

Org Management

Options – such as creating accounting codes or tuition plans – can be set on an enterprise level and are then available to each of your organizations. Unless you remove permissions, organizations can manage their own settings or make use of the ones you've set.

Allow Your Organizations to Create Settings

1. Click on a center in the left menu.
2. Click the **Org Settings** tab at the top. A list of settings opens.
3. Click on a setting in the list. The options for that setting opens on the right.
4. Check “Allow centers in this organization to...” at the top and click **Save Changes**.
5. Repeat for additional settings as desired.

Manage Settings for Your Centers

1. Click on a center in the left menu.
2. Click the **Org Settings** tab at the top. A list of settings opens.
3. Click on a setting in the list. The options for that setting opens on the right.
4. Click the three dots at the top right to add a new setting or follow the prompts provided for that setting.
5. To get additional information Center Settings, see the instructions for that setting under the Center Web Portal section of this guide.

Edit a Setting

1. Click on a center in the left menu.
2. Click the **Org Settings** tab at the top. A list of settings opens.
3. Click on a setting in the list. The options for that setting opens on the right.
4. Click the **edit** icon next to the setting you want to change.
5. For each setting, see the instructions for that setting under the Center Web Portal section.

Manage Organizations

Add a New Organization

1. At the top organization in the left menu, click the three dots and select **Add a new organization**.
2. Enter the name of the organization.
3. Select the Parent Organization from the drop-down list and click **OK**. The organization has now been added and appears in the left menu.

Rename an Organization

1. Locate the organization in the left menu that you want to rename.
2. Click the three dots and select **Rename Organization**.
3. Enter the new name and click **Save**.

Move an Organization

1. Locate the organization in the left menu that you want to move.
2. Click the three dots and select **Move to a different organization**.
3. Select the new Parent Organization from the drop-down list and click **OK**. The organization is now moved under the new parent organization.

Remove an Organization

1. Locate the organization in the left menu that you want to remove.
2. Click the three dots and select **Remove organization**.
3. Click **OK** to confirm.

Center Web Portal

The Center Web Portal gives you access to all of the functionality to manage your center. If certain settings are not enabled, please contact your Smartcare Enterprise administrator for permissions.

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.

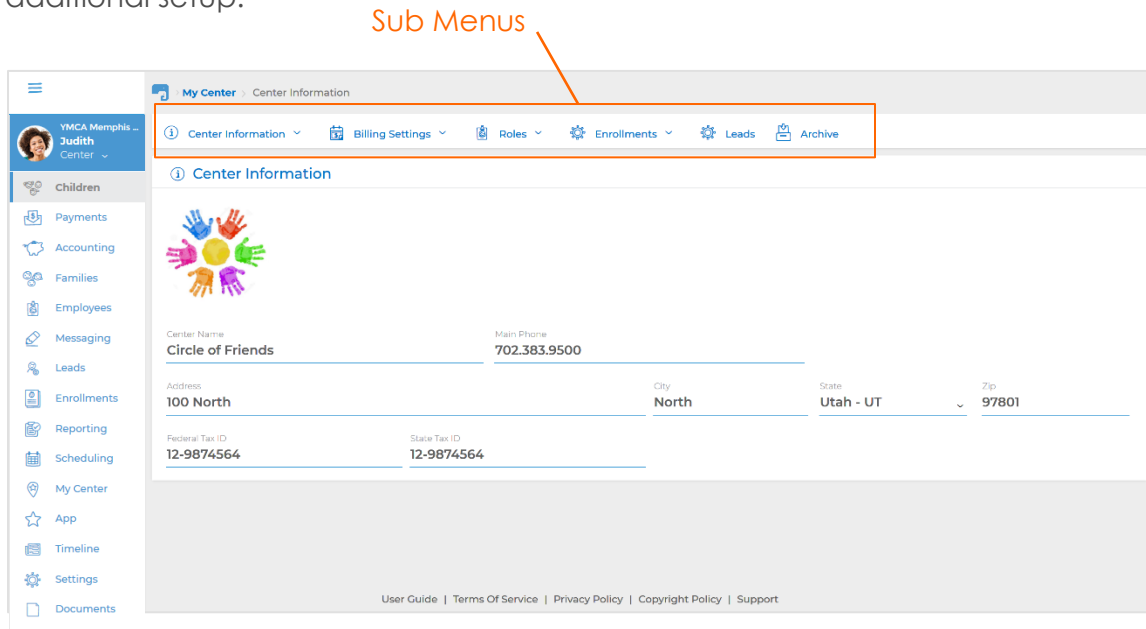
Dashboard

Menu

NAME	LOCATION	SIGNED IN STATUS
☐ Select All		
Amelia Spears	Signed Out	Out
Armina Newman	Signed Out	Out
Baby Lackey	Signed Out	Out

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

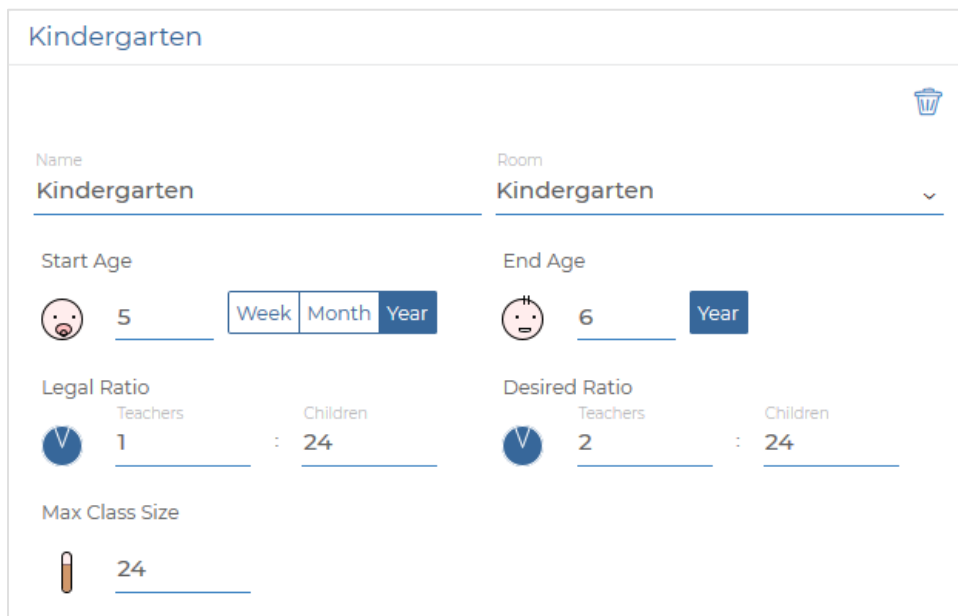
Spaces are physical spaces like playgrounds.

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.



The screenshot shows a form titled "Kindergarten" for setting up a new class. The form includes the following fields and options:

- Name:** Kindergarten
- Room:** Kindergarten (with a dropdown arrow)
- Start Age:** 5 (with a face icon) and unit selection buttons for Week, Month, and Year (Year is selected).
- End Age:** 6 (with a face icon) and unit selection buttons for Week, Month, and Year (Year is selected).
- Legal Ratio:** Teachers: 1, Children: 24 (with a dropdown arrow).
- Desired Ratio:** Teachers: 2, Children: 24 (with a dropdown arrow).
- Max Class Size:** 24 (with a dropdown arrow).

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

The screenshot shows a user interface for a child's profile. At the top, there's a breadcrumb trail: Children > Amelia Spears > Profile. Below this is a section titled 'Profile' with a link 'Click to Change Photo' and a circular photo of a young girl. Under the photo, there are three columns for 'First Name' (Amelia), 'Middle Name' (Middle Name), and 'Last Name' (Spears). Below these are fields for 'Birthday' (July 06, 2017), 'Gender' (Girl), and 'Ethnicity' (White). There's a 'Classroom' section with a 'Default Class Assignment' dropdown set to 'Older Infants'. At the bottom, the 'Additional Info' section is highlighted with an orange box. It contains three fields: 'Photos' (Yes), 'Nick Name' (Lia), and 'Programs' (3-Full Day 3).

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 dose 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."
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**.

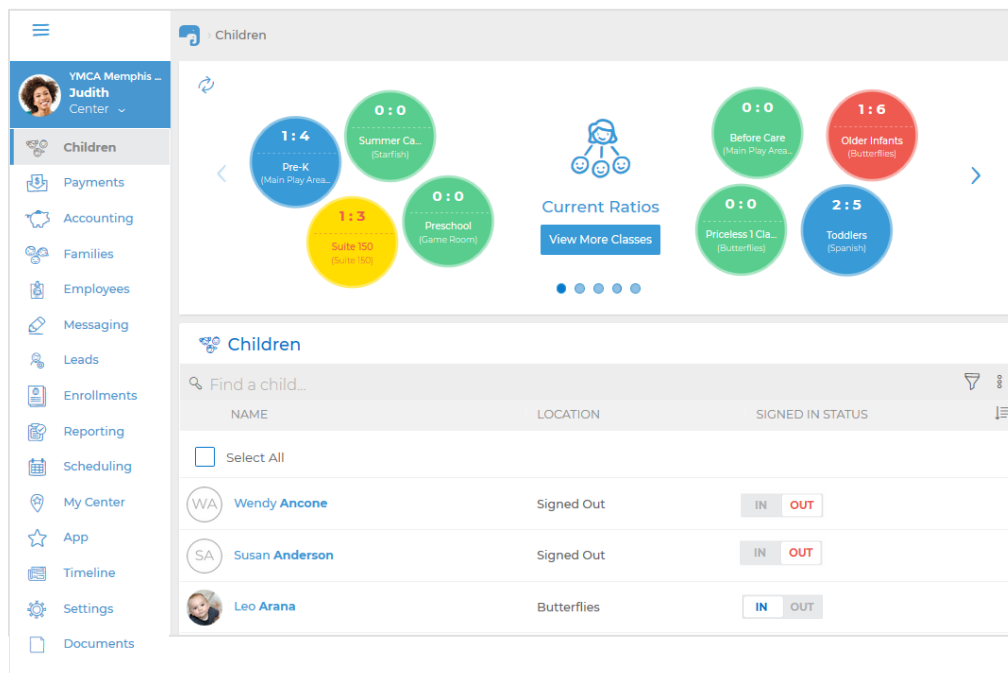
Center Dashboard

When you log into Smartcare Center, the default window is the Birthdays Dashboard 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.



- 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
- Blue: Class is under the desired ratio (if defined), or under the legal ratio (if no legal ratio has been defined)
- Yellow: Class is over the desired ratio but at or under the legal ratio
- 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.

NAME	LOCATION	SIGNED IN STATUS
☐ Select All		
Amelia Spears	Game Room	IN OUT
Armina Newman	Game Room	IN OUT
Baby Lackey	Room 101	IN OUT

Birthdays

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

NAME	LOCATION	SIGNED IN STATUS
☐ Select All		
Amelia Spears	Game Room	IN OUT
Armina Newman	Game Room	IN OUT
Baby Lackey	Room 101	IN OUT

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.

Children

40 enrolled children

[SHOW ENROLLED](#)

Children

Find a child...

NAME	LOCATION	SIGNED IN STATUS
☐ Select All		
Amelia Spears	Game Room	IN OUT
Armina Newman	Game Room	IN OUT
Baby Lackey	Room 101	IN OUT

New Faces

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

Children

1 new faces this month

[SHOW CHILDREN](#)

Children

Find a child...

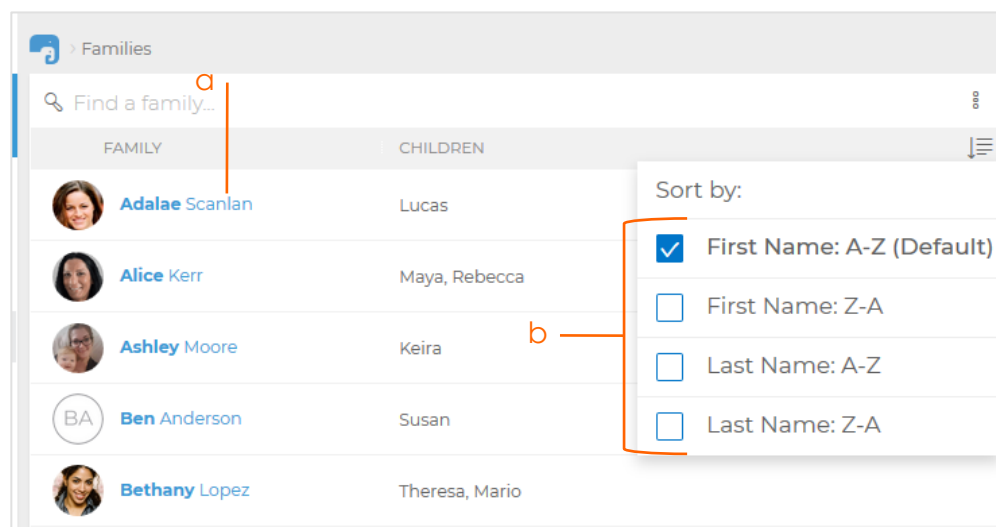
NAME	LOCATION	SIGNED IN STATUS
☐ Select All		
Amelia Spears	Game Room	IN OUT
Armina Newman	Game Room	IN OUT
Baby Lackey	Room 101	IN OUT

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.



Add a Family

1. Click **Families** in the left menu. Your list of families opens.
2. Click the three dots at the top right and select **Add Family**.
3. Click **Add parent / guardian** at the top right.
4. Enter the information for the primary parent or guardian. To get started:
 - a. Enter the First Name.
 - b. Enter the Last Name and click the Tab key on your keyboard. Wait until Smartcare does a system search for any matches to avoid duplicates. You will see "Searching for matches..."

If a possible match is found, you will be prompted with a pop-up and prompted to use that person. Click **Use This Person**.

If no matches are found, the "Searching for matches" prompt disappears and you can continue.

- c. Enter an email address. The email address must be unique to that person. Smartcare does not allow an email address to be assigned to more than one person.
5. Click **Add Photo** to upload a photo if desired.
 6. Under Roles, select the options that apply to this person. If this person is responsible for payment, be sure to select **Create a billing account for this person**. This will set them as the primary account holder.

Note: If the person does not have an email address, do not select "Provide this person with app access."

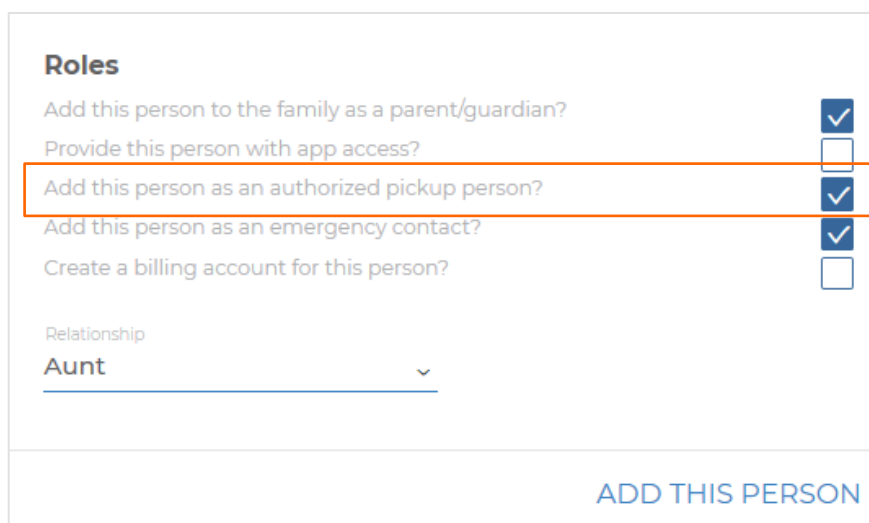
7. Click **Add parent / guardian** when finished.
8. Click **Add parent/ guardian** again to add another person if applicable. This person will be set as the secondary account holder.
9. Click **Add child** at the top right.
10. Enter the information for the child and select a default class assignment.
11. Select **Is this child enrolled in the center?** and select the enrollment date if applicable.
12. Click **Add child** when finished.
13. Click **Add Child** again to add another child if applicable.
14. Click **Add Family** to save.

Add a Person to a Family 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 the **People** box. The list of people in the family opens.
4. Click the three dots at the top right and select **Add Person**.
5. Enter the information for the person.
6. Click **Add Photo** to upload a photo if desired.
7. Under Roles, select the options that apply to this person.
8. Select the relationship to the family from the drop-down list.
9. Click **Add the person**.

Add a Parent or Guardian as a Pickup Person

1. Click **Families** in the left menu. Your list of families opens.
2. Select the family. The Family profile opens.
3. Select the **People** box.
4. Click the three dots at the top right and select **Add Person**.
5. Enter the information for the adult.
6. Under Roles, select **Add this person as an authorized pickup person**.
7. Click **Add This Person** to save.



Roles

Add this person to the family as a parent/guardian? ☒

Provide this person with app access? ☐

Add this person as an authorized pickup person? ☒

Add this person as an emergency contact? ☒

Create a billing account for this person? ☐

Relationship
Aunt ▼

ADD THIS PERSON

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 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

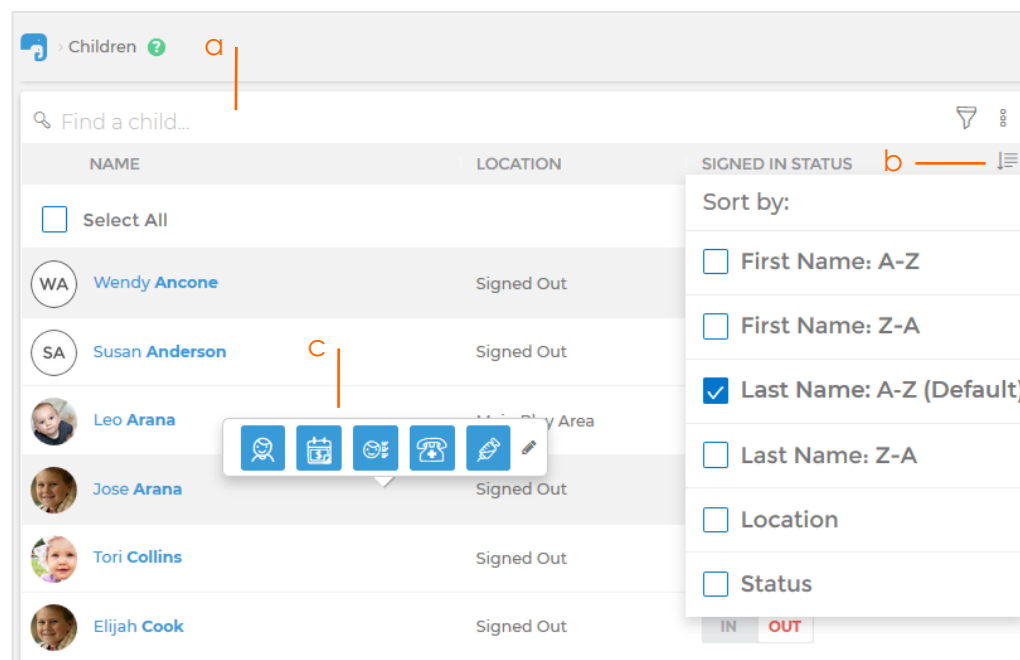
1. Click **My Center** in the left menu.
2. Click **Archive** at the top menu. The Archive window opens.
3. Click **Families** to view a list of archived records.
4. Click **Restore** to the right of the name.
5. Click **Continue** to restore the record.

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 **sort** icon and select a box to sort by first or last name, location (room) or status.
 - 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.

The screenshot shows the 'Children' section of the Smartcare web portal. At the top, there's a search bar labeled 'Find a child...' and two active filters: 'Preschool' and 'Preschool Full Time'. Below this is a table with two columns: 'NAME' and 'LOCATION'. The table lists two children: Brooke Roberts (Signed in to Center) and Bobby Simpson (Signed Out). To the right of the table, a filter dropdown menu is open, showing various filters with checkboxes. The 'Preschool' filter is checked. At the bottom of the page, there are links for 'User Guide', 'Terms Of Service', 'Privacy Policy', 'Copyright Policy', and 'Support'.

NAME	LOCATION
Brooke Roberts	Signed in to Center
Bobby Simpson	Signed Out

Filter icon

Preschool x Preschool Full Time x

Name

Birthday

Gender

Age

Default class assignment

After Care

Infant

Older Infants

Pre-K

Preschool

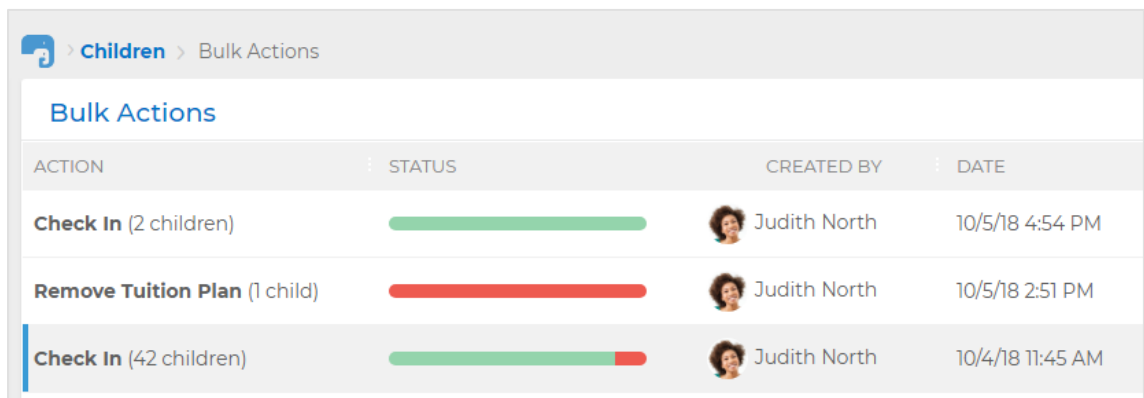
User Guide | Terms Of Service | Privacy Policy | Copyright Policy | Support

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.



Bulk Actions			
ACTION	STATUS	CREATED BY	DATE
Check In (2 children)		Judith North	10/5/18 4:54 PM
Remove Tuition Plan (1 child)		Judith North	10/5/18 2:51 PM
Check In (42 children)		Judith North	10/4/18 11:45 AM

- 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**.

The screenshot shows the 'Add Time' window. It has a title bar 'Add Time' with a close button. The main content area has a 'Date' field with '10/14/2019' and a calendar icon. Below this are two rows for attendance entry. The first row is for 'IN' time, with a time field set to '12:05 PM', a 'Drop-Off Person' dropdown set to 'Douglas Amaro', and a 'Signed In By' dropdown set to 'Judith North'. The second row is for 'OUT' time, with a time field set to '4:00 PM', a 'Pick-Up Person' dropdown set to 'Conception Arana', and a 'Signed Out By' dropdown set to 'Judith North'. A 'Save Changes' button is at the bottom right.

Edit Attendance

1. Click on a time slot on the Attendance window. The Edit Time window opens on the right.
2. Enter the adjusted time in and out.
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.

The screenshot shows the 'Profile' page for a child named Addison Bates. The breadcrumb trail is '> Children > Addison Bates > Profile'. Below the breadcrumb is a '+ Change status' button. A table lists the child's status history:

Status	Effective Date	Notes	Reason
Maternity Leave	May 21, 2018	-	-
Enrolled	May 18, 2016	-	-

The 'Bus run' section is highlighted with an orange box. It contains a 'School' dropdown menu with 'Mountain View' selected. To the right, under 'Transportation', there are three checkboxes: 'Drop Off' (checked), 'Early Pick Up' (unchecked), and 'Pick Up' (checked).

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.

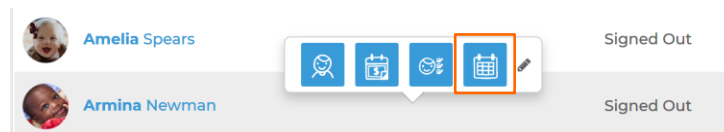
Add a Child's Schedule

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.

A screenshot of the 'Add a Schedule' form. The form has a title bar 'Add a Schedule' with a close button. It contains several fields: 'Class' with a dropdown menu showing 'Pre-K'; 'Date' with a calendar icon and the value '08/19/2019'; 'Start Time' with a dropdown showing '8 00 AM'; and 'End Time' with a dropdown showing '12 30 PM'. Below these is a 'Repeating' dropdown menu which is open, showing a list of options: 'Never' (highlighted with an orange box), 'Every weekday (M-Fr)', 'Weekly on Monday', 'Monthly on the first Monday', and 'Custom'.

Example of creating a custom repeating schedule:

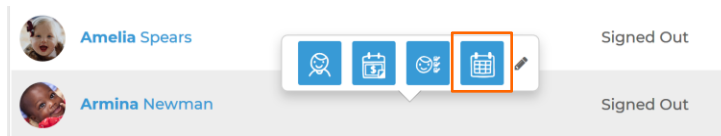
The screenshot shows a form titled "Add a Schedule" with a close button (X) in the top right corner. The form contains the following fields and options:

- Class:** A dropdown menu with "Pre-K" selected.
- Date:** A text field with "08/19/2019" and a calendar icon.
- Start Time:** A time selection field with "8", "30", and "AM" (with a dropdown arrow).
- End Time:** A time selection field with "3", "30", and "PM" (with a dropdown arrow).
- Repeating:** A dropdown menu with "Custom" selected.
- Interval:** A dropdown menu with "Weekly" selected. An orange line labeled "a" points to this dropdown.
- Frequency:** A section labeled "Every 1 weeks on:" with a row of day buttons: Su, Mo, Tu, We, Th, Fr, Sa. The "Mo", "We", and "Fr" buttons are highlighted in blue. An orange line labeled "b" points to this row.
- Ends:** A dropdown menu with "On Date" selected. An orange line labeled "c" points to this dropdown.
- End Date:** A text field with "09/14/2019" and a calendar icon.
- Buttons:** A blue "Add A Schedule" button and a grey "Cancel" button at the bottom right.

- 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

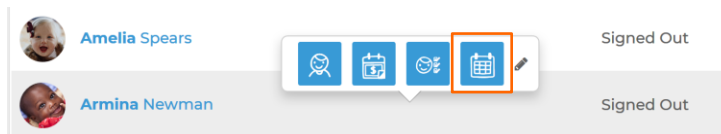
1. Hover over a child in the children's list and select the **schedule** icon from the Quick Actions buttons.



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.

NAME	TOTAL	DATE DUE		
DTaP > 6 Months Overdue	2	11/11/2017	+	☐
Polio Complete	1		+	☒

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**.

The screenshot shows the 'App Access' window for 'Kate Eye'. The window has a header with navigation tabs: 'People', 'Medical', 'Additional Info', 'Notes', and 'Documents'. Below the header, the user's name 'Kate Eye' and a profile picture are displayed. The main content area is titled 'App Access' and shows 'Parent App Access' with a status of 'UNVERIFIED'. There is a checkbox labeled 'Allow Access' which is checked. Below this, the 'Email Address' is listed as 'kate.eye@yahoo.com'. A button labeled 'SAVE & SEND VERIFICATION CODE' is highlighted with an orange border. Below the email address section, there is a 'Kiosk Access' section with another 'Allow Access' checkbox checked. At the bottom, there is an 'Access code' field with a 'SET PIN' button.

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.

The screenshot shows the 'Payment Settings' window. At the top, there is a section for 'Enabled Autopay' with a checked checkbox and 'Autopay Account' with a Visa card icon and the text 'Ending in...1111'. Below this is a table with columns: 'PAYMENT METHODS', 'TYPE', 'EXPIRES', and 'DEFAULT'. The first row shows a Visa card 'Ending in...1111' as a 'Credit Card' expiring '05/22', with a checked checkbox in the 'DEFAULT' column. The second row shows a bank account 'Ending in...6575' as a 'Bank Account'.

PAYMENT METHODS	TYPE	EXPIRES	DEFAULT
Ending in...1111	Credit Card	05/22	☒
Ending in...6575	Bank Account		☐

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.

NAME ~	RELATIONSHIP TO CHILD	PARENT/ GUARDIAN	FAMILY ACCOUNT OWNER
 Mary Albertson	Mother	☒	☐
 Stacy Adams	Aunt	☒	☐
 John Adams	Father	☒	☒

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.

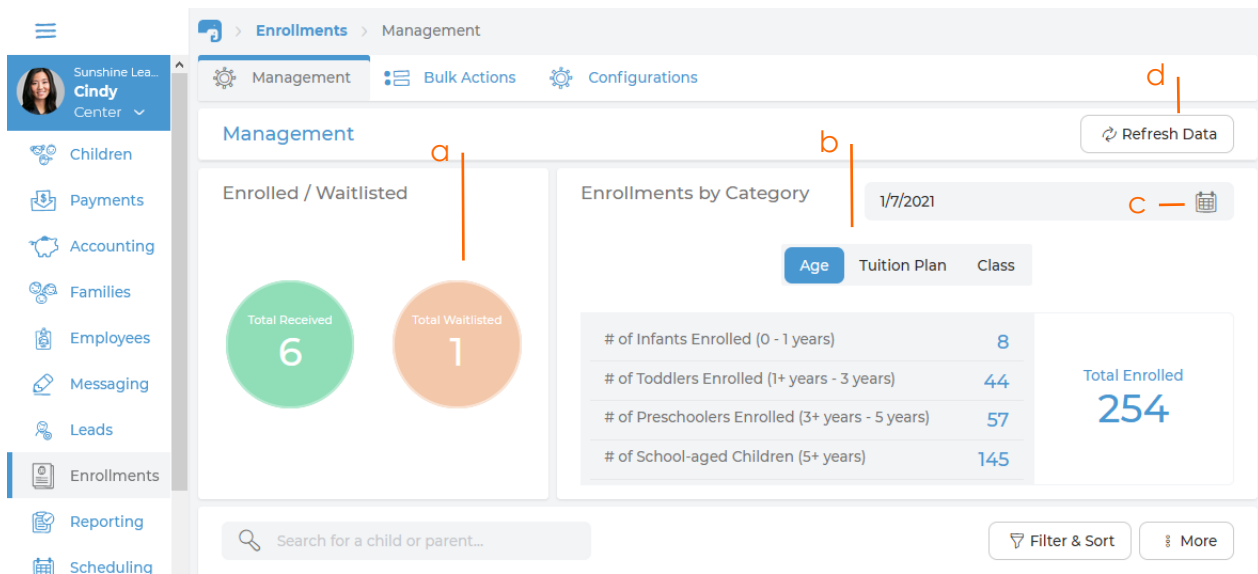
Restore an Adult Record from the Archive

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 **Configuration** 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.

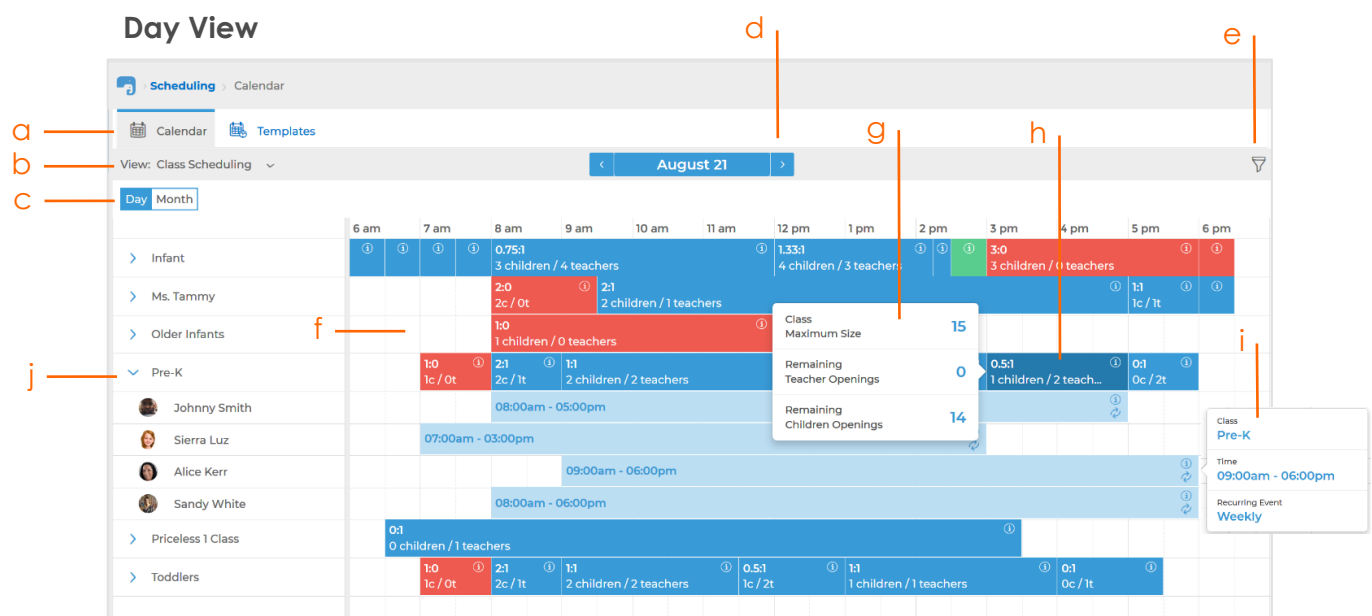
1. Click **Enrollments** in the left menu. The Enrollments window opens.
2. Select the enrollment status to the right of the enrollee's name. You can also use the Bulk Action function for multiple enrollees.

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.



- 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

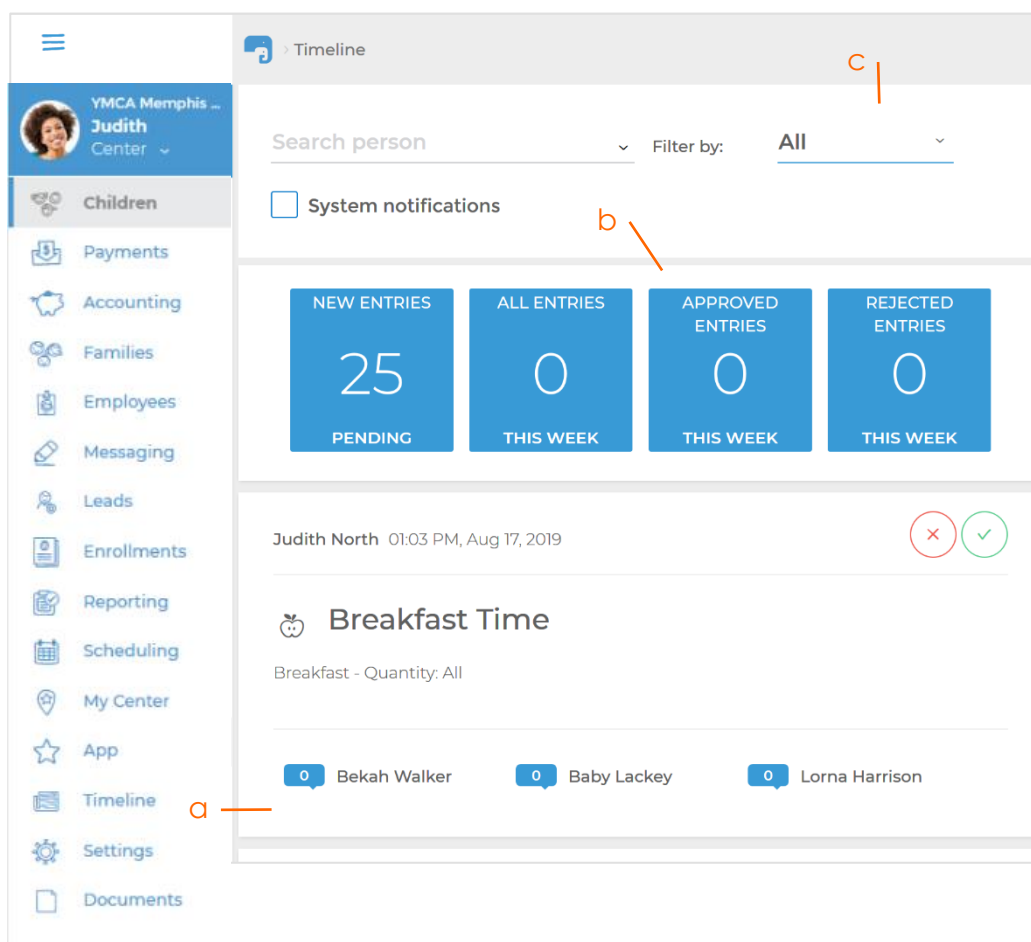
1. Click **Scheduling** in the left menu. Your center's calendar opens to the current month.
2. Click the Templates tab.
3. Click on the row of the template you want to delete. The template side bar opens.
4. Click the three dots at the top right and select **Delete Scheduling Template**.

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

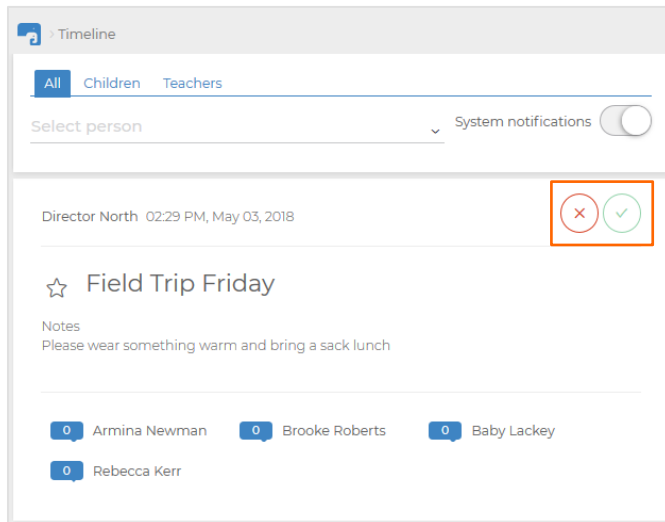
1. Click **Timeline** in the left menu. The Timeline window opens.



- 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.

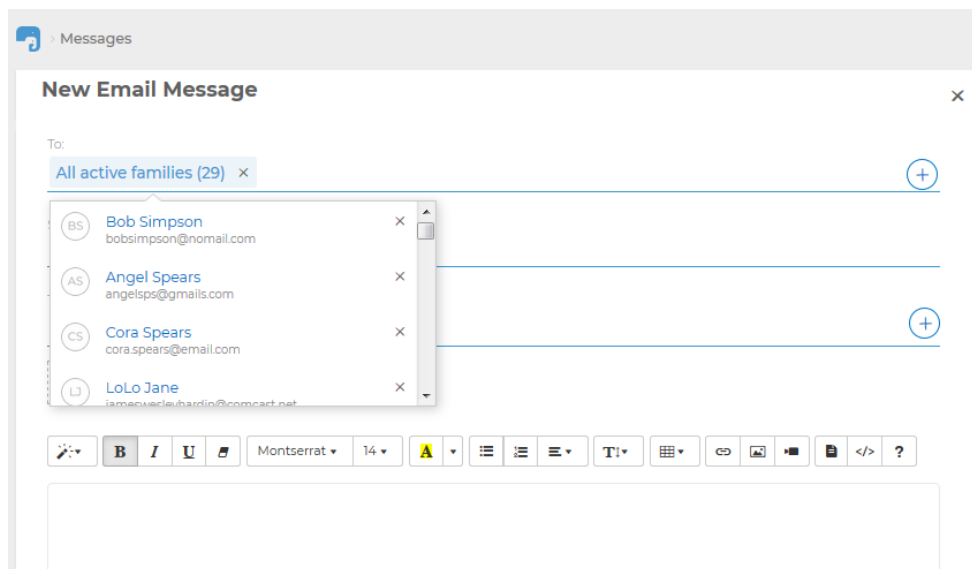


7. Use **Merge Fields** to add personalization or specific information to your message if desired.
8. Click **Preview email** to view it before sending or click **Send email to all recipients** when finished.

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.

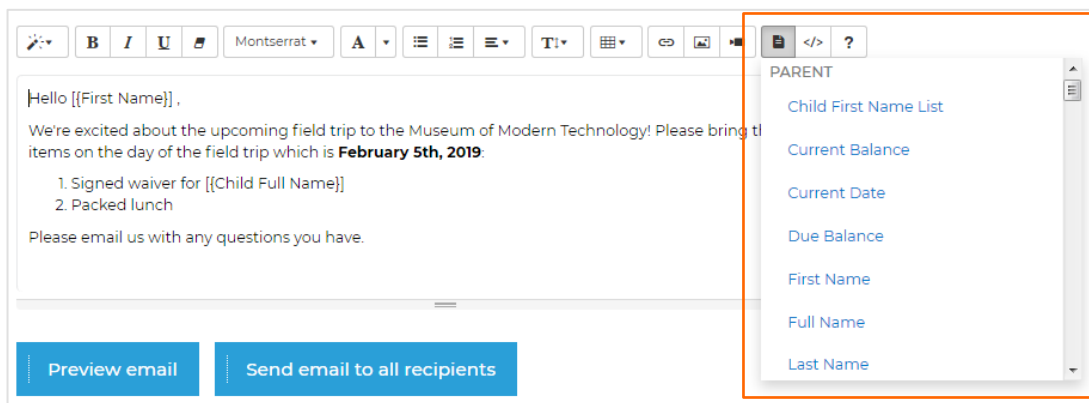


8. Use **Merge Fields** to add personalization or specific information to bulk messages if desired.
9. Click **Preview email** to view it before sending or click **Send email to all recipients** when finished.

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.

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.

The screenshot shows the 'Employees' page in the Smartcare system. At the top, there is a search bar labeled 'Find an employee...' with a magnifying glass icon. Below the search bar is a table with columns: NAME, CLASS, HOURS, and STATUS. The table lists several employees: Alice Kerr, Collette Hull, Corena Bahr, Cynthia Miller, James Davison, and Jennifer Jones. A 'Select All' checkbox is located to the left of the first row. A 'filter' icon (a funnel) is located above the table. A 'Sort by' dropdown menu is open, showing options: 'First Name: A-Z (Default)' (selected), 'First Name: Z-A', 'Last Name: A-Z', 'Last Name: Z-A', 'Hours: Low to High', and 'Hours: High to Low'. A 'Quick Actions' menu is open over the first row, showing icons for 'View Profile', 'Edit Profile', 'Archive', and 'Delete'. Annotations 'a', 'b', and 'c' are present: 'a' points to the search bar, 'b' points to the filter icon, and 'c' points to the Quick Actions menu.

NAME	CLASS	HOURS	STATUS
☐ Select All			
Alice Kerr	-	0	
Collette Hull	Priceless 1 Class	9.52	
Corena Bahr	-	0	
Cynthia Miller	-	0	
James Davison	-	0	
Jennifer Jones	-	0	

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:

The image shows a card for the 'Smartcare Admin' employee. It features a profile picture of a woman and the text 'Smartcare Admin - DO NOT EDIT OR DELETE'.

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.

The screenshot shows a modal window titled "Add a Schedule" with a close button (X) in the top right corner. The form contains the following fields and options:

- a** points to the **Date** field, which displays "08/20/2019" and a calendar icon.
- b** points to the **Start Time** field, which displays "7 00 AM".
- c** points to the **Position** dropdown menu, which currently shows "Director".
- d** points to the **Type** dropdown menu, which currently shows "Regular Hours".
- e** points to the **Break** dropdown menu, which currently shows "1 hour".
- f** points to the **Repeating** dropdown menu, which currently shows "Every weekday (M-Fr)".

At the bottom right of the form are two buttons: a blue "Add A Schedule" button and a "Cancel" button.

- 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.

Resend Registration Email to an Employee

1. Click the **menu** icon in the lower left of the window and select **Employees**. Your list of employees opens.
2. Select an employee from the list.
3. Select the **App Access** tab at the bottom of the window. The App Access window opens.
4. Click **Send Forgot Credentials Email**.
5. Click the **X** at the top right to exit out of the window.

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.

Scheduling						
Week		Month		December 8 - 14		
	Su 8	Mo 9	Tu 10	We 11	Th 12	Fr 13
7 am						
8 am		Non-teacher 08:00 am - 04:00 pm (60 min break)	Non-teacher 08:00 am - 04:00 pm (60 min break)	Non-t... 08:00 am - 04:00 pm (60 min)	Vacat... 08:00 am - 04:00 pm (60 min)	Non-teacher 08:00 am - 04:00 pm (60 min break)
9 am						
10 am						
11 am						
12 pm						
1 pm						

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 children 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**.

New Billing Schedule

☒ Active

Type
Monthly

Name
Monthly Billing

My billing period runs through the Last day of the month

I want tuition charges placed on parents' accounts 20 days before the end of the billing period ⓘ

Payments are due on the 5 of the month

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.

☐ Twice a month

☒ Weekly ⓘ

☐ Weekly Friday

Billing schedule details
You cannot deactivate the billing schedule on the last day of the billing period

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 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

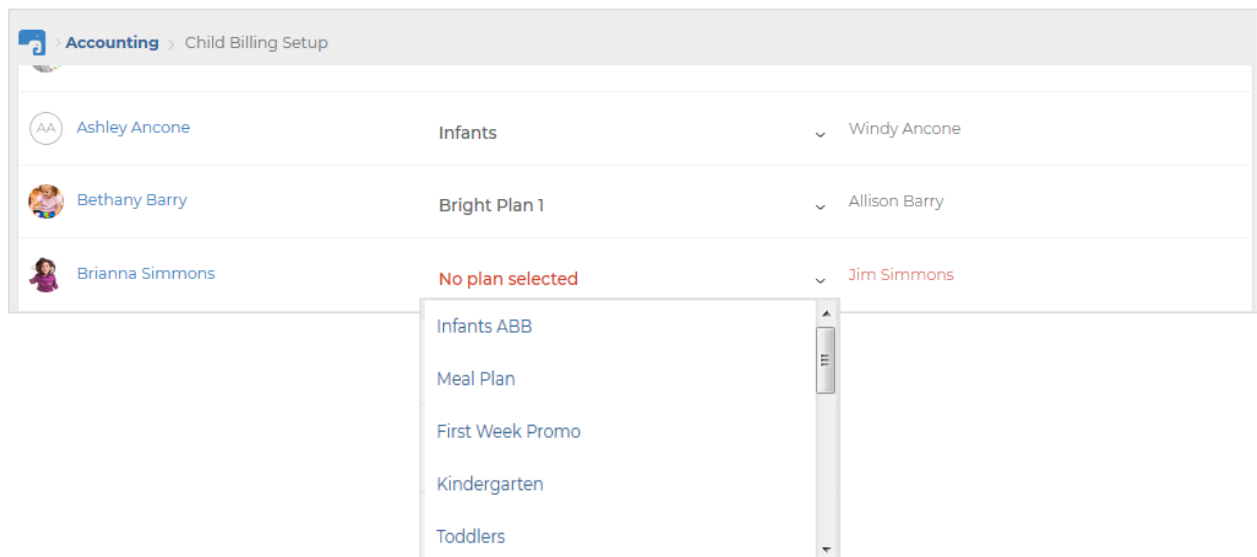
When you choose to delete a Tuition Plan, note that you can only delete Tuition Plans that are not assigned to one or more children.

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.

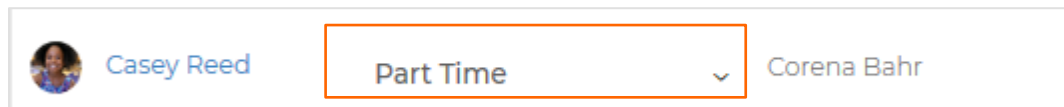
Set Up Child Billing Plan

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** icon. 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** icon. 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**.

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.
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.

The screenshot shows the 'Accounting' section of a web portal. On the left is a navigation menu with 'Accounting' selected. The main area displays a table of accounts. An orange line with a circled 'a' points to the search bar above the table. Another orange line with a circled 'b' points to the 'Sort by' dropdown menu on the right side of the table.

Account	Account Ledger	Balance
(AW) Williams Adrian / Venus	View Transactions	\$3,015.00
(AH) Harris Alexander / Brenda	View Transactions	\$0.00
(CD) Davis Charles / Melissa	View Transactions	\$3,255.00
(CK) Knecht Connor / Clara	View Transactions	\$3,255.00
(DG) Grafton Donald / Ruby	View Transactions	\$3,175.00
(EK) Kuss Evan / Molly	View Transactions	\$3,015.00
(FC) Cothran Frank / Victoria	View Transactions	\$3,175.00

Sort by:

- ☒ First Name: A-Z (Default)
- ☐ First Name: Z-A
- ☐ Last Name: A-Z
- ☐ Last Name: Z-A
- ☐ Balance: Low to High
- ☐ Balance: High to Low

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.

The screenshot displays the Smartcare Accounting Donations page. The left sidebar shows the 'Accounting' menu selected. The top navigation bar has 'Donations' highlighted with an orange box. The main content area shows a table of donations with columns for Account, Date, Amount, and Details. Three donations are listed: Bahr Corena (\$10.00), Camden Dan Morriss (\$1.00), and Ackerman Test Alyssa Test (\$1.00). Each row has a 'View more Details' link.

Account	Date	Amount	Details
Bahr Corena	May 21, 2020	\$10.00	View more Details
Camden Dan Morriss	May 19, 2020	\$1.00	View more Details
AA Ackerman Test Alyssa Test	Apr 29, 2020	\$1.00	View more Details

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.

Auto-Pay

☒ Auto-pay required for all accounts

Auto-Pay Exceptions ⓘ

Rachelle Cook ▾ 🗑️

Bob Spears ▾ 🗑️

+ Add another exception

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.

The screenshot shows a modal window titled "Add a charge" with a close button (X) in the top right corner. The form contains the following fields and options:

- Amount (\$)**: A text input field containing "\$5.50". A bracket labeled "a" points to this field.
- Accounting Code**: A dropdown menu showing "Meals". A bracket labeled "b" points to this field.
- Notes**: A text input field containing "lunch (forgot to bring)". A bracket labeled "c" points to this field.
- Invoice now**: A checkbox that is checked. A bracket labeled "d" points to this checkbox.
- Payment Due Date**: A date input field showing "March 13, 2019" with a calendar icon. A bracket labeled "e" points to this field.
- Charge late payment fees**: An unchecked checkbox with an information icon (i).
- Add**: A blue button at the bottom right.

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

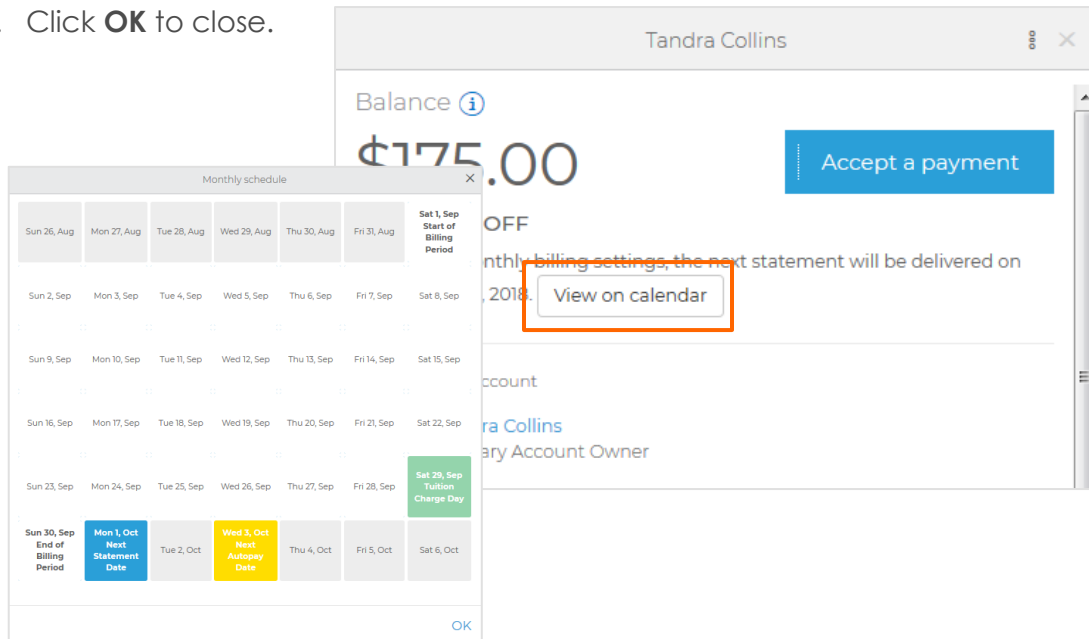
The Billing Status function enables you to see the details related to statement periods during a selected date range.

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.

State Subsidy

Balance

\$1,350.00

Start Date End Date

DATE	NOTES	CHARGES	CREDITS	BALANCE	
a ✓ 09/09/18	Infant Full Time for Lorna Harrison	\$25.00	\$25.00	\$0.00	0.00
b ● 09/05/18	Transfer (Balance Transfer from legacy agency)	\$1,600.00	\$250.00	\$1,350.00	0.00

- 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 enter 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

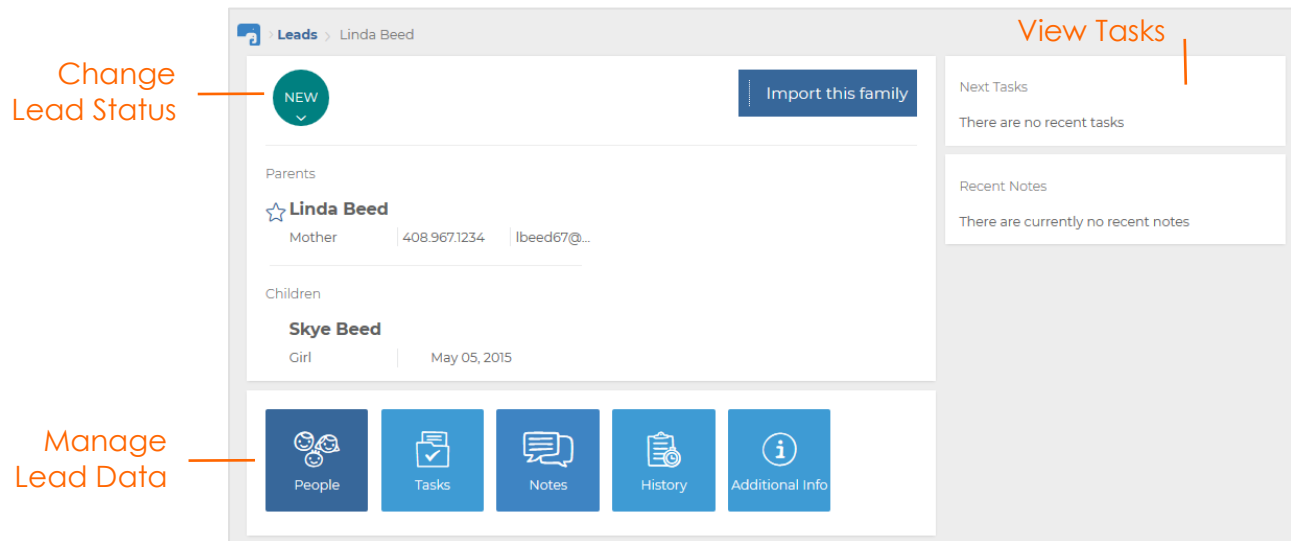
1. Click **My Center** in the left menu.
2. Click Leads in the top menu. A list of your Lead Statuses and Lead Sources opens.
3. Click the three dots at the top right and select **Add a Lead Status**.
4. Enter the Name of the status and select a color from the drop-down list.
5. Click **Save new lead status** at the bottom.
6. Click the three dots to the right of Lead Sources and select **Add a Lead Source**.
7. 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**.

Edit Workflow Action

Name

Tour Scheduled

Action Timing

Immediately

Action

Action

Create Task

Conditions

Field

Lead Status

Operator

Not Equal

Value

Enrolled

Field

Lead Status

Operator

Equals

Value

New

+ Add new condition

Task

Task Name

Tour Packet

Task Details

Get tour packet and gift ready for the guest tour.

Due date after task is created

0 : 0 : 0

Reminder prior to due date

1 : 0 : 0

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.

The screenshot shows the 'Conversion Report' interface. At the top, there's a navigation bar with 'Leads', 'Tasks', 'Workflows', and 'Conversion Report'. Below this, the report configuration area includes:
 - Date range: 'Leads from June 05, 2018' to 'July 05, 2018'.
 - 'Calculated by' dropdown set to 'Lead created date'.
 - 'Group dates by' dropdown set to 'Week'.
 - A checkbox 'Include leads in conversion calculation if the lead skipped a status'.
 - 'Set Lead Status Order' section with a list of statuses: Enrolled, New, Tour Completed, Tour Scheduled, and Lost.
 - 'Group by' section with 'Lead source' and 'Custom field - Walk-in'.
 - 'Ratios' section with 'Ratio 1' set to 'Tour Complete / New'.
 - Action buttons: 'Save changes', 'View the report', and 'Download the report'.
 - Footer links: 'User Guide | Terms Of Service | Privacy Policy | Copyright Policy | Support'.

- 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.