Welcome to the

Procare Software®
Getting Started Guide

1 West Main St., Ste 201
Medford, OR 97501
USA

Sales	Support	Tuition Express
ProcareSoftware.com	**ProcareSupport.com**	**TuitionExpress.com**
1 (800) 338-3884	1 (800) 964-1729	1 (888) 419-5033
6 a.m. - 5 p.m. Pacific M-F	4 a.m. - 5 p.m. Pacific M-F	6 a.m. - 4:30 p.m. Pacific M-F
sales@procaresoftware.com	tech@procaresoftware.com	

Credits

Technical Writing & Editing: Phil Eschtruth Harrison, Director of Communications & Training
Cover Art & Graphic Design: Katie Anderson, Sr. UI/UX Designer/Developer

Please email ideas, comments and corrections to: suggestions@procaresoftware.com.

Welcome to Procare

Get Started Today!

This guide will help you "Get Started" with the basic things you'll need to know.

1. Install Procare and Log In

See page 2 for the basics. For details, search ProcareSupport.com for articles KB0914 (Cloud) and KB0901 (non-Cloud).

2. Set Up your Groups and Users

Set up the names and capabilities of your groups(s), like Director, Assistant Director, Teacher (page 10) and the people who will use Procare, known as *Procare Users* (page 12).

3. Create your Classrooms, Schedules, Tracking

Define the names of classrooms, set up typical schedules and create tracking categories like programs, bus runs, etc., to which you'll assign children and families (page 18).

4. Enter Families

Now you're ready to enter basic parent, child and emergency contact information (page 29).

Learn How at *ProcareSupport.com*

Get the most from Procare with online learning tools:

• Attend a free *Webinar* (or watch a recorded version).

• Take a self-paced class at *Procare U*.

• Watch short, task-specific *Videos* built into most articles in the online *Knowledge Base* (see "Find Your Answer" in the sidebar).

• Schedule your setup training call—1 hour free with your first-time purchase (page viii).

> ▶ **Live & Recorded Webinars**
>
> Get off to a quick start with free webinars!
>
> Visit *ProcareSupport.com* and choose *Learn Procare*.

Introduction

Help at Your Fingertips! Use the *Question Mark* on any Procare screen to connect to the online Knowledge Base, then click the link under *Search Results*.

Your Search Results

Showing 1-10 of 421 for "child schedule"

Assign Child Schedules - Procare Sup

Assign **Child Sched**... Family & Child Information #
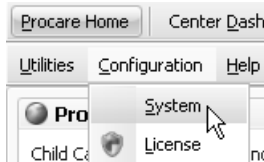
KB0914

Find Your Answer: All Knowledge Base articles referenced here, like KB0914, may be found at ProcareSupport.com. Just search for the article number.

Using this Guide

Getting Around

This guide uses shorthand to explain how to get around the screen:

Configuration > System

Procare Home | Center Dash

Utilities Configuration Help
 ○ Pro   System
 ○ Child Ca   License   no

Shorthand
Go to *Configuration > System > Locations & Users.*

What it Means
Click the "*Configuration*" menu (in the upper left) then click "*System*" and choose the item labeled "*Locations & Users*".

Symbols

The following symbols appear throughout this guide.*

Key Concept
Conceptual information that is key to understanding how Procare works.

Alert
Important note. Detail you need to know about a specific topic, but not of a conceptual nature.

General Information
Useful information, but not as critical as Alerts or Key Concepts.

Notes, Hints, & Tips
Additional notes, hints and tips to help you get the most from your management software.

Search for More
Get more information about a topic. Search ProcareSupport.com for the article number indicated.

*Symbols courtesy of pixel-mixer.com.

Our Commitment to You

Thank you for choosing Procare Software. Your confidence in us is greatly appreciated.

The mission of Procare is to provide the best management software and quality services to our customers. Specifically, our commitment is centered around the following goals and objectives:

- To ensure that the relationship between ourselves and our customers is one of sincere trust and to do everything possible to achieve and maintain that trust.
- To deliver to each customer the best integrated management solutions and provide quality service, now and into the future.
- To serve our customers with focus on their goals and objectives.
- To treat each customer with care, concern, dignity and sensitivity.
- To conduct ourselves in the utmost professional manner, adhering to the highest ethical standards and putting the interests of our customers first.

Thank you for letting us have this opportunity to serve your needs.

Sincerely,

JoAnn Kintzel, President/CEO
Procare Software

Acceptable Use Policy

Your purchase of this Procare Software® product gives you title to this single copy of the software. You own this copy and may sell it to another party. For any subsequent owners, Procare offers technical support and training, online or by phone, for an additional fee(s). Additional registration fee(s) may also apply. Procare Software, LLC reserves all rights under U.S. Copyright Law to the intellectual property created by Procare Software, the Procare Software v10 program, all related ancillary software, and all documentation.

Warranties

Software Warranty

Procare Software, LLC warrants that, for a period of ninety (90) days from the date of delivery to you, as evidenced by the date on your invoice, the media/download from which the program is installed under normal use will be free from defects in materials and workmanship and the program under normal use will function without significant errors that make it unusable. If you notify Procare Software within the warranty period of any such defects, the media/download will be replaced.

The sole remedy for breach of this warranty is limited to replacement of defective materials and does not include any other kinds of damages. Procare does not issue refunds on software.

The entire risk as to the performance of the programs is with the purchaser. Procare Software does not warrant that the operation of the programs will be uninterrupted or error-free. Procare Software assumes no responsibility or liability of any kind for errors in the program or documentation or for the consequences of any such errors. In no event will Procare Software be liable for any damages, including loss of data, lost profits, or other special, incidental, consequential or indirect damages from the use of the program or accompanying documentation, however caused and on any theory of liability. You acknowledge that your use of the software includes these risks.

Hardware Warranty

Hardware directly from Procare Software carries a one (1) year warranty against defects in materials or workmanship from the date of delivery, as evidenced by the date on your invoice. Warranty is for repair or replacement only. Procare does not issue refunds on hardware. Warranties do not cover cosmetic damage or damage by weather, negligence, misuse or accident, or repair or modification by unauthorized persons.

Hardware from one of our distributors is warranted for the length of time offered by the distributor. Any warranty issues related to this hardware must be handled directly with the distributor.

Note:
Terms of the above warranties are subject to change without notice.

Technical Support Policy

Answers to Specific Questions

Toll-free Technical Support is available to answer specific trouble-shooting, installation and product related questions for all current versions of Procare. Procare makes a distinction between technical support and training. Questions of a broad nature (e.g. step-by-step walk-throughs, general use of the software, setup specific to your unique situation, etc.) are considered training calls. See *Training* below.

Maintain a Current Version

Software changes over time to adapt to continuous advancements in technology. Therefore, Procare supports only current product versions; those released within the last twelve months. In order to receive free support you must maintain a current version of Procare. Cloud customers are always on the latest version. For non-Cloud users this means purchasing an annual update of your software which includes a twelve month subscription to the online update service (allowing you to download the latest features and enhancements) as well as access to toll-free support.

Visit *ProcareOnline.com/Store* to order your annual update—or become a Procare Cloud customer (you're always on the latest version with no annual update fees!).

Training - Free Setup Call!

A one-hour FREE SETUP CALL is included with your first-time purchase of Procare. We'll help you get off to a smooth start and discuss how to best implement Procare for your particular situation. Additional training and consultation is available for a modest fee.

Learn from the comfort of your home or office using your own data. Just share your computer desktop with us for a true hands-on learning experience and ask questions while we guide you through each step.

Email clientservices@procaresoftware.com.

Table of Contents

Contents at a Glance

Learn Procare ˅   Resources ˅

Learn Procare!
Visit ProcareSupport.com to access a variety of free learning tools.

Complete Table of Contents

Table of Contents

Table of Contents

Getting Started with

Installation and Login

Basic Installation and steps to log in for the first time are covered here. For more details visit ProcareSupport.com.

Install and Log Into Procare

Procare is designed to run on the Windows® family of operating systems, including: Windows 10, 8, 7, and Windows Server. Search ProcareSupport.com for current *system requirements*.

Before You Begin

Log on to the computer with local "Administrator" privileges, confirm all **Windows Updates** have been installed and close all programs.

What Type of Installation?

Procare Cloud

If you chose to host your data in the Procare Cloud, you'll receive separate instructions by email. Search ProcareSupport.com for article KB0914. Once the Procare Cloud is installed, skip ahead to page 3 and learn how to *Log In for the First Time*.

Check-In Computer or Procare Touch Computer?
Will families or employees check in at this computer? Answer "yes" during installation to create a *Check-In* shortcut on your desktop.

When installing on a Procare Touch Screen Computer, see article KB0911 at ProcareSupport.com.

Your Computer Technician: You may need a local computer technician to set up your network.

You (or your technician) may call in advance to ask questions or arrange an appointment for the time your technician will be on site.

Install on a non-Cloud (local) Computer

If you're not using the Procare Cloud, see article KB0371 at ProcareSupport.com to download the installer or use the link in your "Welcome to Procare" email.

Multiple non-Cloud Computers? If you have more than one non-Cloud computer:

1. Begin at the main computer (the one that will host your data) and do a *Full Install*.

2. Then, go to each individual computer where you'll use Procare and install the *Client* software.

Your Own SQL Server or Apps Server? When installing a non-Cloud version of Procare on your own SQL Server or other dedicated server, choose an *Advanced Install*. Search ProcareSupport. com for article KB0902.

> ⚠ Do not install SQL on a domain controller. See: support.micro-soft.com/kb/2032911.

Log In for the First Time

Once Procare is installed you'll want to log in and begin setting up your information.

Procare V10

1. Dbl-click the Procare shortcut on your desktop.

2. Log in at the main Procare screen (upper right). Type **admin** both for your *Username* and your *Password*, then click the *Login* button (or tap *Enter* on your keyboard).

   User Login
   Username: admin
   Password: •••••
   Login

3. You'll be prompted to change your password.

   a. Enter your *Current Password* (the old one) of **admin**.

   Change Password
   Enter your old and new password information below to change your password.
   Current Password: •••••
   New Password: •••••••••• Very Strong
   Confirm New Password: ••••••••••

   Password Requirements
   Must meet all of the following criteria:
   - At least 7 characters in length
   - Contain both characters and numbers
   - Not be the same as previous 4 passwords
   Change Password   Exit

   b. Enter a *New Password*, then *Confirm* the new password.

   c. Click *Change Password* and you'll be automatically logged in as the *Default Administrator*.

   > ⚠ Important! Your *Username* is still **admin** (see sidebar).

4. Next, you'll be prompted to select your personal *Security Questions*. If you forget your password, you may reset it by answering these questions or using Google Authenticator (see page 15).

   a. Enter the new *Password* you just selected.

⚠

Don't log in as **admin** all the time. Set yourself up as a *Procare User* with your own username and password—which you'll do in the *Setup Wizard* (page 4) or may be done later on (page 12).

Power Options: Computers are often set for the hard disk, network card, etc., to turn off after a period of time. Procare strongly advises choosing high performance settings so the computer (and its components) do not go to sleep. Search ProcareSupport.com for article KB0496.

b. Choose your questions, type the answers and click *Save*.

Closed the Wizard? The *Setup Wizard* only runs once, but you can configure all the same setting yourself. See page 8.

5. You may be prompted to register the software. If so, choose to register online or by phone, then click the *Register* button.

Setup Wizard

Once you've logged in the very first time, the *Setup Wizard* will open automatically. If you close the wizard, you can configure the settings manually (see sidebar).

Follow the on-screen instructions to:

1. Enter the name, logo, and tax ID for your school(s).
2. You may be asked to choose which modules to use at each school (if you have more than one).
3. Enter the names of your classrooms.
4. Add yourself as a user.

Your Next Steps

1. Set Up your Groups and Users

    Set up the names and capabilities of your groups(s), like Director, Assistant Director, Teacher (page 10) and the people who will use Procare, known as Procare Users (page 12).

2. Create your Classrooms, Schedules, Tracking

    Define the names of classrooms, set up typical schedules and create tracking categories like programs, bus runs, etc., to which you'll assign children and families (page 18).

3. Enter Families

    Now you're ready to enter basic parent, child and emergency contact information (page 29).

Learn Procare ˅   Resources ˅

Learn Procare!
Visit ProcareSupport.com to access a variety of free learning tools.

Getting Started with

Configuring Procare

When you Configure Procare you'll choose overall settings that affect all parts of your management software. You'll enter the names of your locations as well as the people who will use Procare and their level of access to the system.

Configure Your Procare

Once you've signed in for the very first time (page 3), you'll need to configure some basic Procare settings including:

- The names of your locations and the default settings for each location.
- The people who will use Procare, including the *User Groups* and security limits for those people and yourself.

System Supervisor

Items marked with a shield 🛡 will only be available to persons in the System Supervisor User Group. You'll learn more about User Groups on page 10.

Name Your Locations 🛡 (System Supervisor required)

First, you'll enter the names of your child care locations.

Note: You may have already done this using the *Setup Wizard* the very first time you logged in. This is the place to make changes to those settings.

1. From the *Procare Home* screen go to *Configuration > System > Locations & Users.*

2. Dbl-click *Regions & Schools*.

System Configuration

- Locations & Users
  - Regions & Schools
  - User Groups & Limits
  - Procare Users
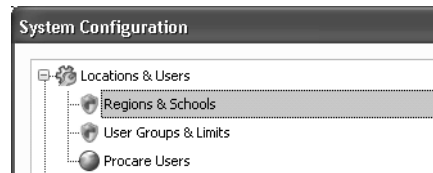
A *Region* is a geographic area like 'Pacific Northwest' or 'SE Florida'. If you have just one center use the name of your city.

A *School* is the name of your center. If you have more than one location indicate that in the name, like "Kid's Place - Downtown".

Change the name of a Region, or Add a New One

In most cases you'll have just one region (see sidebar), but you'll want to change its name and contact information.

Change an existing region

1. Click once on the *Region Name* (like "My Region") to select it, then click *Edit* (bottom of screen).

   Edit

2. Make any desired changes. You may even add a school logo (see sidebar page 9).

3. Click *Save > Exit*.

Add a new region (for large organizations only)

1. Click *Add Region*.

2. Enter a *Region Name* (your area or city) and an abbreviation for the *Region Code* (like PNW for Pacific Northwest).

3. Enter the name of the director, email, address, etc. (optional).

4. Click *Save > Exit*.

Change the name of a School or Add a New One

Give the appropriate name to each of your child care locations (known as schools) and update the contact information.

Change an existing school

1. Click the plus sign (+) next to the *Region Code* to see any existing schools in that region.

Single Location

Region Code	Region Name
R1	My Region

	School Code	School Name
▶	S1	My School

Multiple Locations

Region Code	Region Name
R1	My Region

	School Code	School Name
▶	S1	My School 1
	S2	My School 2

2. Click once on the *School Name* to select it, then click *Edit* (bottom of screen). For example, you'll want to change the default name of "My School" to be the actual name of your facility, like "Little Red Schoolhouse".

3. Make any desired changes. You may even add a school logo (see sidebar).

4. Click *Save > Exit*.

Add a logo for the whole *Region* or a specific *School* to be printed on Customer Statements, etc. See article KB0507 at ProcareSupport.com.

Add a new school

If you only have one location, there's no need to add a new school; just change the name of "My School" (explained above).

1. Click the plus sign (+) next to the *Region Code* to see any existing schools in that region.

2. Click *Add School*.

3. Enter a *School Name* (name of your center) and an abbreviation for the *School Code* (like S2 to indicate your second location).

4. Enter the name of the director, email, address, etc. (optional).

5. Click *Save > Exit*.

Options for Regions/Schools (System Supervisor required)

Options are choices that affect a particular Region or School, like the hours a location is open or how Child Time Cards should be rounded. You may *Set Options* now or come back later when you are working on a particular area of the program.

Set Options for the one location you have selected or an entire Region.

1. From the *Procare Home* screen go to *Configuration > System > Locations & Users.*

2. Dbl-click *Regions & Schools*.

Options for a Region

To choose options for all schools within a Region:

a. Dbl-click the *Region*, or click once to select it, then click the *Set Options* button.

b. On the left choose a category like *General, Family Data, Family Accounting*, etc.

c. Choose any options as desired, then click *Save > Exit*.

Learn about specific *Options* at ProcareSupport.com. Search for article KB0030.

Options for a School

Options for a school take precedent over options for the region:

Hint: Use the *Reset School* button to change options for a specific School back to match the Regional options.

a. Click the plus sign (+) next to the *Region Code* to see any existing schools in that region.

b. Dbl-click the *School*, or click once to select it, then click the *Set Options* button.

c. On the left choose a category like *General, Family Data, Family Accounting*, etc.

d. Choose any options as desired, then click *Save > Exit*.

User Groups & Limits (System Supervisor required)

Create groups and assign people who use Procare to them. Groups may have limits to prevent people from performing certain tasks. A

single center with a few employees might have two or three groups. A large center or child care chain might have dozens of groups.

1. From the *Procare Home* screen go to *Configuration > System > Locations & Users.*

2. Dbl-click *User Groups & Limits*
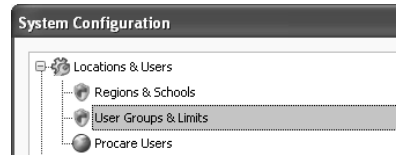
Naming Groups

System Supervisor
The System Supervisor is always the highest group level and cannot be limited in any way. This is the group to which a center owner or IT manager would be assigned.

Other Groups
Other groups may be named anything you like such as Regional Manager, Director, Teacher, Aide, Staff, Student Intern, etc.

Hierarchy (order of the groups)
The order of the groups is important. Groups in a higher position can change or add users at lower levels only, provided their Group has permission to add / edit users.

Change the order of *Groups* using the up & down arrows.

Example of group order
Assume you had four groups: System Supervisor, Director, Teacher and Aide. The *Director* could add people at the *Teacher* or *Aide* level, while a *Teacher* could add people at the *Aide* level only.

Add a New Group

1. Click the blank line at the top of the screen and enter a *User Group Name* like "Director".

2. Add a *Comment* to describe the group (optional).

3. Tap *Enter* to display a new blank line. The new group will appear at the bottom of the list.
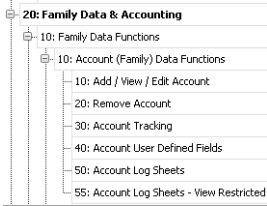
Hint: Check a top level item like *Family Data & Accounting* or a mid level item like *Account Data Functions* to block all settings within that category.

The People you add as *Procare Users* are staff or volunteers who will have access to Procare.

A *New Person* is someone who has never been entered into Procare. An *Existing Person* can be found somewhere else. A staff member might be entered under Procare Users, Employee Data and even Family Data (as a parent). A child might be entered under two family accounts. The first time you enter them they are a New Person, after that add them as an Existing Person.

Assign Limits to a Group

1. Click once on the *Group Name* to select it, then click *Group Limits*.

2. Place a check next to an item like *20: Remove Account* to block (prevent) persons in that group from performing that task.

3. Click *Save > Exit*.
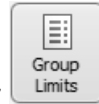
Copy Limits

Use the *Copy Limits* button to duplicate limits set on one group as a starting point for the group on which you are working. If you already have limits set for a group called "Teachers" you could copy those limits to a group called "Teacher Aides".
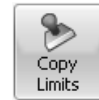
Procare Users

Now you're ready to add the people who will use Procare and assign them to a User Group.

1. From the *Procare Home* screen go to *Configuration > System > Locations & Users*
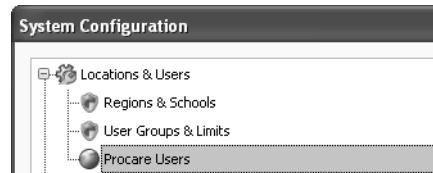
2. Dbl-click *Procare Users*.

Add a Person

A *Person* can be anyone including staff, parents, children, doctors, authorized pick ups, etc. Some people may have multiple roles. An employee might also be a parent and an emergency contact for another family.

1. At the Procare Users screen click the *Arrow* on the *Users* button to expand your options. Choose *Add New Person* or *Add Existing Person* (see sidebar).

2. Enter data on the *Person Information* screen.

    a. Enter the name, DOB, gender, email, etc., as desired. The only required fields are first & last name.

    b. Under *Address Information* click *New* and enter their ad-

dress, then click *Update*. You may enter more than one address; just click *Update* after each one, then click *Exit* to return to the *Person Information* screen.

> Hint: To change an existing address or phone number dbl-click anywhere in the address or phone box.

c.   Under *Phone Information* click *New* and choose a *Telephone Type* (like work, home, or cell). Enter the *Area Code* and *Telephone Number* and a *Comment* (optional) then click *Update*. You may enter more than one phone number; just click *Update* after each one, then click *Exit* to return to the *Person Information* screen.

d.   To add a *Photo* see page 41.

3.   Once the basic information for this person has been entered click *Continue* (lower right).

4.   If people with similar names are found you'll have a chance to:

a.   Select a suggested person as a match and reconcile the information of the two people. Click the name of a suggested person (top half of screen - image page 30) then click *Select* (upper right). There may be information to reconcile. If so, check the address(es), phone number(s) and email you wish to keep, then click *Continue*. You'll return to the *Person Information* screen where you may make any necessary changes, then click *Save > Exit*.

b.   Continue with the person you have just entered to save them as a brand new person. Click once on their name under the *New Person* section (bottom half of screen - image page 30) then click *Save* (lower right).

c.   If no match is found you'll return to *Procare Users*.

5.   The new person will be on the top row of the *Procare Users* screen. Enter the following:

a.   *Title*: like Owner, Director, Manager, Teacher, Assistant.

b.   *User Name*: used for login purposes - can be their initials, nickname, etc.

c.   *Identifier*: for tracking who did what & when and showing people currently logged in - typically their initials.

d.   *User Group*: like Director, Teacher, Assistant, etc. - determines tasks they may perform.

e.   Click *Save*, but do not *Exit*. You'll want to configure *Exposure* for this person first (see next page).

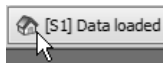A unique *Username* is required. No other user may have the same one.

What is Exposure? Exposure means giving people access to certain locations. It can also mean making a category, like "PreK Tuition", visible to specific locations.

Note: Exposure does not apply to members of the *System Supervisor* user group since they automatically have access to all regions and schools.

Expose User to Regions & Schools

Once you've added a *Person* as a *Procare User* you'll need to specify which locations they may access:

Give access to *all* Regions & Schools
If you have just a single location this is the appropriate choice.

1. At the Procare Users screen, click the name of a Person to select them.

2. Click the *Arrow* on the *Expose* button to expand your options and choose *Expose to All Regions.*

3. You're done. You may add another user or Exit.

Give access to *specific* Regions & Schools only

1. At the Procare Users screen, click the name of a Person to select them.

2. Click the *Arrow* on the *Expose* button to expand your options and Choose *Set Individual Exposure Settings*.

3. Check mark the Regions and/or Schools you want this person to access (see sidebar).
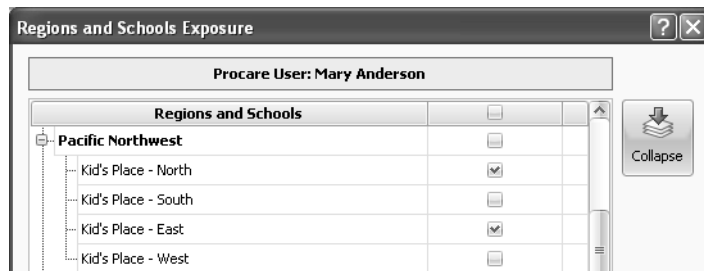
4. Click *Save > Exit* to return to the *Procare Users* screen.

5. You may add another user or Exit.

Passwords

What's my Password?

- The very first time a person logs on their *Username* and *Password* are the same, except the password is lowercase. If the *Username* were ABC123, the *Password* would initially be abc123 (see sidebar page 15).

- Once a person signs in, they must select a new password known only to them. At this point the password is case sensitive.

Once a person logs in, they may click *Change School* (at the *Home* screen) or dbl-click the schoolhouse icon in the lower left of screens like the Dashboard, Family Data & Accounting, etc., to access any location to which they are exposed.

Reset Password / Forgot Password

1. If a person forgets their password, they may reset it on their own by clicking the *Forgot Password* link and either:

   a. answering their *Security Questions* (see article KB0140 at ProcareSupport.com)

   b. or using Google Authenticator, which they must set up ahead of time (article KB0368 at ProcareSupport.com).

2. If they are unable to reset their own password, their supervisor may reset it (article KB0140 at ProcareSupport.com).

3. Once reset, the *Username* and *Password* are the same, except the password is lowercase. If the *Username* were ABC123, the *Password* would initially be abc123 (see sidebar). After logging in, they must select a new password known only to them. The new password is case sensitive.
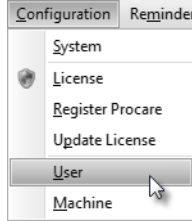
Change my Password

A person may change their own password; but, they must know their existing password to do so.

1. From the Procare *Home* screen go to *Configuration > User > Change Password*.

2. Enter your old (existing) password, then enter (and confirm) your *New Password* and click *Change Password*.

Choose a Color Scheme

You can change the appearance of Procare by selecting a "skin" or color scheme. Each person who uses Procare may select the look they prefer (see sidebar image).

1. From the *Procare Home* screen go to *Configuration > User*.

2. Check the box that says "Use a program skin" and pick a color scheme from the drop down list.

Backing Up Your Data (non-Cloud)

 When using Procare Cloud, all backups are handled automatically. If you're a non-Cloud customer, it's important to make backups on a daily basis. See articles KB0018 and KB0145 at ProcareSupport.com.

Is it case sensitive?
Usernames are never case sensitive. *Passwords* begin as all lowercase for a brand-new user and after a password reset. Once a new password is selected, it is then case sensitive.

Color Scheme

Getting Started with

Family Data

Family Data is the place to record all family and child related information including enrollment dates, schedules, classrooms and immunization records.

In Family Data you may also assign authorized pickups, emergency contacts, etc., and store photographs of family members and pickup persons.

The 3 Keys to Procare

Each Procare module has three key parts:

*   **Configuration** - Where you choose the overall settings that affect all families, employees, etc. (see below).

*   **Data Entry** - Entering information about a family, child, employee, etc. (page 29).

*   **Reports** - Print reports based on the settings you have configured and the data entered (page 48).

Get more detail on how to configure Family Data at ProcareSupport.com.

Configure Family Data

Before entering family information, you'll want to configure at least some of the overall settings that affect all families, like classroom names. Other items, such as schedule templates, tracking categories and immunization requirements, may be set now or later.

Departments, Work Areas, Classrooms

Begin with Departments, then go to Work Areas and Classrooms.

Note: You may have already done part of this using the *Setup Wizard* the very first time you logged in. This is the place to make changes to those settings.

Set Up Departments

Create Departments for areas that generate revenue (like the Infants Dept., Toddlers Dept., PreK Dept.) and staff-related overhead (like Administration, Transportation, Food Service, etc.).

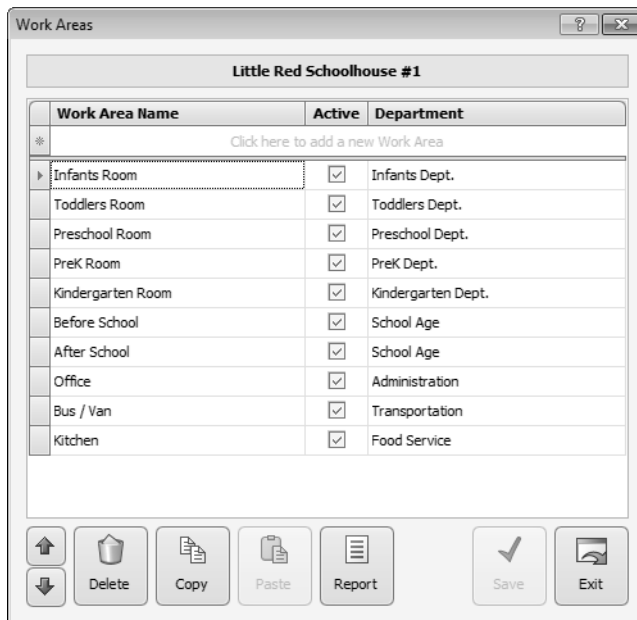1. From the *Procare Home* screen click *Configuration > System.*
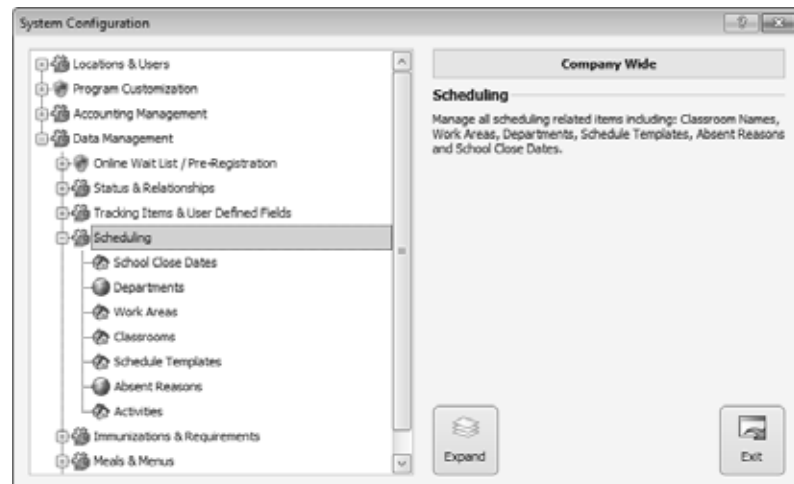
2. Go to *Data Management* > *Scheduling* > dbl-click *Departments.*

3. Type a new *Department Name* on the top (blank) line. Then tap *Enter* (on your keyboard) to get a new line where you may add more departments.

4. Use the *Up & Down* arrows to change their order as needed, then click *Save* > *Exit*.

Create Work Areas

Work Areas are the places people work like the Toddler Room, Miss Mary's Room, Room 1, etc. Work areas include not only classroom names, but other areas like the Front Office, Kitchen, and Transportation Shed.

1. Begin at the *System Configuration* screen with the *Data Management* and *Scheduling* sections expanded.

2. Dbl-click *Work Areas* (for multiple locations see sidebar).

3. Type the name of a new *Work Area* on the top (blank) line and assign it to a *Department*. Then tap *Enter* (on your keyboard) to get a new line where you may add more work areas.

Work Areas		? ⛝
Little Red Schoolhouse #1		
Work Area Name	**Active**	**Department**
*		Click here to add a new Work Area
▸ Infants Room	☑	Infants Dept.
Toddlers Room	☑	Toddlers Dept.
Preschool Room	☑	Preschool Dept.
PreK Room	☑	PreK Dept.
Kindergarten Room	☑	Kindergarten Dept.
Before School	☑	School Age
After School	☑	School Age
Office	☑	Administration
Bus / Van	☑	Transportation
Kitchen	☑	Food Service

⬆ ⬇ Delete Copy Paste Report Save Exit

4. Use the *Up & Down* arrows to change their order as needed, then click *Save* > *Exit*.

   See page 112 for how to assign *Work Areas* to an employee.

Sidebar

• Departments
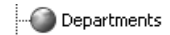
A Globe indicates an item is "global". If you have more than one location, it affects all locations.

• Work Areas

A Schoolhouse means an item is "local". If you have more than one location, it only affects the one you have selected.

Change School

To change locations click once on an item to select it (like *Work Areas, Classrooms,* etc.). Then click *Change School* and choose a location.

Copy   Paste

Copy & Paste *Work Areas* and *Classrooms* from one location to another. Search ProcareSupport.com for article KB0040.

Classrooms

Select *Classrooms* from your list of *Work Areas*.

Hint: Use the *Classroom Graduation* feature to move a group of children from one class to another. Search ProcareSupport. com for article KB0143.

Classroom Names

1. Begin at the *System Configuration* screen with the *Data Management* and *Scheduling* sections expanded.

2. Dbl-click *Classrooms*.

3. Click the top (blank) line then:

   a. Choose a *Classroom Name* from the list of *Work Areas*.

   b. (Optional) Enter an *In* and *Out Time* to be used as the default times for child schedules. Of course you may make changes for individual children as needed.

Classroom Name	In Time	Out Time	Ratio	Max
*	Click here to add a new Classroom			
Infant Room	08:30 AM	01:30 PM	4.00	8
Toddler Room	09:00 AM	02:30 PM	6.00	12
Preschool Room	08:30 AM	12:30 PM	12.00	24

   c. (Optional) Enter the *Ratio* (number of children allowed per teacher) and *Maximum* number of children for that classroom.

   d. Then tap *Enter* (on your keyboard) to get a new line where you may add more classrooms.

4. Use the *Up & Down* arrows to change their order as needed, then click *Save > Exit*.

Ready to Add Families?

Now that you've got *Classroom Names* set up, you may continue with this chapter or jump ahead to adding families on page 29. You can always come back to add re-usable schedule templates, tracking categories, immunizations, etc., later on.

Schedule Templates

Templates save time if many children have similar schedules.

Name Your Templates

1. From the *Procare Home* screen click *Configuration > System.*

2. Go to *Data Management > Scheduling >* dbl-click *Schedule Templates.*

3. At the *Schedule Templates* screen click the *Manage > New*.

4. Enter a *Template Name* like "Preschool - MWF" and click *Save*. Continue adding new Template Names clicking *Save* after each one, then click *Exit*.

5. At the *Manage Templates* screen:

Template Name	Comment	MyProcare
Preschool Full Time	5 Days	☑
Preschool M, W, F	3 Days	☑
After School M - F	Daily 3:00 - 5:30	☑

a. Use the *Up & Down* arrows to change their order.

b. Procare Cloud: If you want parents to have certain templates to choose for their children at MyProcare.com, place a check in the MyProcare box.

> Tip: Learn how to turn on and use Family Selected Scheduling. See article KB0615 at ProcareSupport.com.

6. Click *Save > Exit* to return to the *Schedule Templates* screen.

Put Days and Times into Templates

1. At the *Schedule Templates* screen click the *Template Name* (left side) like "Preschool - MWF" to select it.

2. To set up the schedule select a *Classroom Name* like "Preschool" or "Miss Mary's Room".

3. Choose the first *Day* for this schedule like Monday and enter the *In* and *Out* times, then tap *Enter*. A new line appears for you to set up the next day (see sidebar).

Classroom Name	Day	In	Out
Preschool Room	Mon	8:30 AM	11:30 AM
Preschool Room	Wed	8:30 AM	11:30 AM
Preschool Room	Fri	8:30 AM	11:30 AM

4. When all days for this template are complete click *Save*. Repeat for other templates, then click *Exit*.

See page 36 for how to add schedules to a child.

School Close Dates

Scheduling is also affected by holidays or other days when you will be closed. Begin at the *System Configuration* screen with the *Data Management* and *Scheduling* sections expanded.

1. Dbl-click *School Close Dates*.

2. Select a *Date* on the next blank line and type a *Description* like "New Year's Day", "Memorial Day", "Thanksgiving", etc., then tap *Enter* (on your keyboard) to get a new blank line.

3. Continue adding dates as needed, then click *Save > Exit.* For multiple locations see sidebar hint.

Day	In
Mon	8:30 AM

Entering Time: Use the *Spacebar* to quickly enter time like 8 [spacebar] 30 [spacebar] A for 8:30 AM.

Use *Copy Day* to quickly repeat information for the next day. Tap *Enter* to get a new blank line then click *Copy Day*.

Hint: Copy & Paste *School Close Dates* from one location to another. Search ProcareSupport.com for article KB0038.

Absent Reasons

Absent Reasons are used to track hours a child is absent such as "Vacation", "Dr. Appointment", "Out Sick", etc.
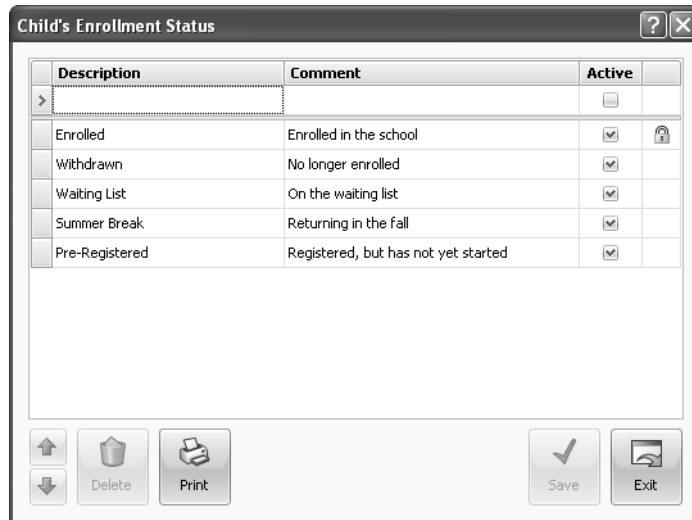
1. Begin at the *System Configuration* screen with the *Data Management* and *Scheduling* sections expanded.

2. Dbl-click *Absent Reasons*.

3. Click the top (blank) line and type a *Description* like "Vacation", "Dr. Appointment", etc. Add a *Comment* (optional) to explain when this reason would be used and check the *Active* box, then tap *Enter* (on your keyboard) to get a new blank line.

4. Continue adding reasons as needed, then click *Save* > *Exit.*

Enrollment Status

"Enrolled" is the status you'll use during times a child is attending the center (now or in the future). Create additional status levels to cover time periods when they are not enrolled such as: waiting list, pre-registered, summer break, withdrawn, etc.

1. From the *Procare Home* screen click *Configuration* > *System.*

2. Go to *Data Management* > *Status & Relationships* > dbl-click *Child's Enrollment Status.*

3. To create a new status click the top (blank) line and enter a *Description* like "Waiting List" with a *Comment* (optional) if the status requires further explanation, then click *Save*. Continue adding new enrollment descriptions clicking *Save* after each one.

The lock means "**Enrolled**" is a required System Setting. Create your own status levels for periods when a child is not enrolled.

Description	Comment	Active	
		☐	
Enrolled	Enrolled in the school	☑	🔒
Withdrawn	No longer enrolled	☑	
Waiting List	On the waiting list	☑	
Summer Break	Returning in the fall	☑	
Pre-Registered	Registered, but has not yet started	☑	

4. Use the *Up & Down* arrows to change their order, then click *Exit*.

Child Relationships

Relationships are used to explain how different people are con-nected to each child. For example it may be a family member like mom, dad, grandparent, aunt, etc. Other people outside the fam-ily like emergency contacts, authorized pickup people, baby sitters, and the child's doctor may also be connected to the child.

1. From the *Procare Home* screen click *Configuration > System.*

2. Go to *Data Management > Status & Relationships >* dbl-click *Child Relationships*.

3. To create a new Relationship click the top (blank) line and enter a *Description* like "Family Friend" with a *Comment* (optional) if it requires further explanation, then click *Save*. Continue adding new Relationship descriptions clicking *Save* after each one.

4. Use the *Up & Down* arrows to change their order if needed, then click *Exit*.

Tracking Items & User Defined Fields

Tracking Items are categories you create that may apply to many families or children while *User Defined Fields* are better for informa-tion specific to a single family or child. For example, to track a range of income levels use Tracking Items, but to record the exact income of a particular family create a User Defined Field.

Other possible uses of *Tracking Items* include: marketing (how someone heard about you), marital status, parent volunteers, bus runs, programs, activities, field trips, allergies, developmental mile-stones and whether certain forms or permission slips have been received. Most anything you'd want to track would work.

Global Tracking and Local Tracking

Tracking Items are set up and managed the same way whether they are considered "global" or "local" (see sidebar).

First: Add a Tracking Group
A *Group* is the overall category for the thing you want to track. If you were tracking income levels "Family Income" would be the *Group* and the various income levels would be *Items* within the *Group*.

1. From the *Procare Home* screen click *Configuration > System*.

2. Go to *Data Management > Tracking Items & User Defined Fields.*

3. Dbl-click either *Global Tracking Items* or *Local Tracking Items*.

What's the difference be-tween Global and Local? You may "expose" *Global* items for use at more than one location, while *Local* items are unique for each school. Global items are also used to create parent-facing questions for use with MyProcare (page 99) and appear above lo-cal ones when you assign them to a family, child, etc. The typical best practice is to use *Global*.

4. Click the tab (at top) for whom these tracking items apply such as the *Account* (family as a whole), *Child*, *Employee* or *Vendor*.

5. To create a new Tracking Group click the top (blank) line and enter a *Tracking Group Name* like "Family Income". Then, choose whether the *Group Type* will be *Single Item* (you can only select one item in the group) or *Multi Item* (you can select as many as you want for the same family, child, etc.). Next, add *Tool Tip Text* (optional) if more info is needed to explain when to use this group, then tap *Enter* to create a new (blank) line.

6. If this is *Global Tracking*, the *Exposure* screen will automatically appear. Choose which locations have access to this *Group* and click *Save > Exit*. (See page 14 for more about exposure).

7. Use the *Up & Down* arrows to change the *Group* order if needed.

Next: Add Tracking Items within the Group
Now that you've got a *Group*, you'll want to add *Items* within the *Group*. These *Items* will be the things you may assign to specific families, like a range of income levels.

8. Continued from above: Begin at the *Tracking Items* screen with your various *Tracking Group Names* showing.

9. Click the plus sign (+) next to the *Group* to which you want to add *Items*. This will expand the *Group* showing you any Items that have previously been entered.

10. To add a new *Item* click the top (blank) line and enter an *Item Name*. For income levels your first item might be called "Zero to 12,000".

11. Set a *Usage Limit* (optional) to be alerted when this item has been assigned to more than a certain number of people. Click once in the *Usage Limit* box. Remove the check from "Unlimited Use". Enter the number of times this item may be assigned before being warned (see sidebar).

> Note: For multiple locations the limit is combined. If the limit were 24 and the item were exposed to 3 locations, then a combined total of 24 people could be assigned from those locations (i.e. 8 from each or any combination that equals 24).

12. Enter *Tool Tip Text* (optional) if this item needs further explanation for staff members who will assign it to people.

> Note: The *Tool Tip* is also used to create questions for parents to answer during online registration through MyProcare (page 99).

13. Tap *Enter* (on your keyboard) to create a new blank line. Continue adding new items to this group tapping *Enter* after each one. Use the *Up & Down* arrows to change their order.

14. Click *Save*. Repeat steps to add new *Groups* and *Items*, then click *Exit*.

> See page 39 for how to assign Tracking Items to a family or child.

The *Usage Limit* alerts you when a *Tracking Item* is assigned to more than the specified number of people. You may also choose to be alerted in advance (as you approach the limit) search ProcareSupport.com for article KB0030.

User Defined Fields

User Defined Fields are boxes you create to hold specific information about a family or child. They may be text boxes, dates, yes / no answers, or numbers.

1. From the *Procare Home* screen click *Configuration > System.*

2. Go to *Data Management > Tracking Items & User Defined Fields* > dbl-click *User Defined Fields*.

3. Click a tab at the top depending on whether these fields will apply to the *Account* (family), *Child*, *Employee* or *Vendor*.

User Defined Fields are best used to record things that vary from family to family like their exact income, whether they qualify for a certain government program, or the date they were approved for something.

4. To create a new *User Defined Field* click the top (blank) line and enter a *Field Name* like "Income".

5. Choose a *Field Type* of *True/False*, *Date*, *Number* or *Text*. Add *Tool Tip Text* (optional) if more info is needed to explain when to use this field. Then tap *Enter* to create a new (blank) line.

> Note: The *Tool Tip* is also used to create questions for parents to answer during online registration through MyProcare (page 99).

Use the **Expose** button to change the locations that have access to each *User Defined Field, Global Tracking Group* and *Global Immunizations.*

To change an existing Immunization or Requirement just dbl-click the name of the item, like Varicella.

6. The *Exposure* screen will automatically appear. Choose which locations have access to this *Group* and click *Save > Exit*. (See page 14 for more about exposure).

7. Use the *Up & Down* arrows to change the order as needed, then click *Save > Exit.*

> See page 39 for how to enter data in User Defined Fields.

Immunizations & Requirements

Set up your *Immunization Schedule* and any other date based *Requirements* needed for your state, county or other authority.

Global Immunizations, Global or Local Requirements

Immunizations are always "global". In other words they may be set for all locations at once. Other date based *Requirements* may be either "global" or "local" (see sidebar page 23).

Add an Immunization or Other Requirement

1. From the *Procare Home* screen click *Configuration > System.*

2. Go to *Data Management > Immunizations & Requirements >* dbl-click either *Global Child Immunizations & Requirements* or *Local Child Requirements.*

3. Click *New*.

4. Enter a *Name, Category* and *Tool Tip* (optional). For "local" items the *Category* will be set to *Requirement*.

Global Child Immunization / Requirement	
Name	Category
Varicella	Immunization
Tool Tip	
Chickenpox	

5. Enter the *Schedule* for this item; the period when each vaccination or other requirement is due.

a. Click the first (blank) line and choose whether this first occurrence is due at so many "months of age" or so many "days after enrollment". For example, it may initially be due at birth (0 months), 1 month, 6 months, etc. Or, perhaps it is paperwork due 30 days after enrollment. Enter the appropriate number and click the small *Save* button.

b. If this item is due a second time, click the second (blank) line and choose whether it is due so many "months later", "every (so many) months", or at so many "months of age". Enter the appropriate number and click the small *Save* button.

c. If this item is due three or more times, click the next (blank) line and choose the appropriate answer. The choices depend on how you set up the second occurrence. If you said at so many "months of age", then any additional items must also be due at a specific age.

d. If on the second item you said so many months later, for the third item you could choose so many "months later" or "every so many months". This may be appropriate for a recurring physical.

e. Repeat this step until all required occurrences have been scheduled.

Family Data

1	The 1st event is due at 2 months of age, and then
2	the 2nd event is due at 6 months of age, and then
3	the 3rd event is due at 12 months of age, and then
4	the last event is due at 24 months of age.

Enter the schedule for this Item

6. You'll end up with a complete schedule showing when each shot in the sequence is due. Click *Save > Exit* to return to the list of immunizations.

Description	Category
Polio	Immunization
DPT	Immunization
TBTine	Immunization
MMR	Immunization
Hib	Immunization
Varicella	Immunization

7. If this is a "global" item, the *Exposure* screen will automatically appear. Choose which locations have access and click *Save > Exit*. (See page 14 for more about exposure).

> Hint: You may also use the *Expose* button arrow to make changes to the locations that will use it. Even if you have just one location, be sure to click *Expose* to make it available to *All Regions*.

Expose Delete Report

Expose to All Regions
Set Individual Exposure Settings
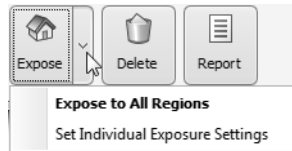
8. Use the *Up & Down* arrows to change the order as needed, then click *Save > Exit.*

> Note: See page 38 to enter immunizations for a child.

Phone Number Types, Log Sheets, Misc.

You may wish to set up miscellaneous items such as the types of phone numbers (home, work, cell) and log sheets (billing, scheduling, medical).

1. From the *Procare Home* screen click *Configuration > System.*

2. Go to *Data Management > Miscellaneous*.

Add Phone Number Types

1. Begin at the *System Configuration* screen with the *Data Management* and *Miscellaneous* sections expanded (see above).

2. Dbl-click *Phone Number Types*.

3. Click on the top (blank) line and enter a *Description* like "Home",

"Office", "Cell", "Pager", etc. Enter a *Comment* (optional) if this item requires further explanation.

4. Click *Save*. Continue entering new items using the *Up & Down* arrows to change their order. When finished click *Exit*.

Add Log Sheet Types

1. Begin at the *System Configuration* screen with the *Data Management* and *Miscellaneous* sections expanded (page 28).

2. Dbl-click the log sheet type like *Account Log Sheet Types, Child Log Sheet Types*, etc.

3. Click the top (blank) line and enter a *Description* like "Billing", "Scheduling", "Medical", etc. Enter a *Comment* (optional).

4. Click *Save*. Continue entering new items using the *Up & Down* arrows to change their order. When finished click *Exit*.

Family Information

Now that you've set up the basic *System Configuration* settings you're ready to begin entering families and children.

Enter a Family (an Account)

1. From the main screen of *Family Data & Accounting*, click *Add Account* (folder with plus sign) on the account toolbar.
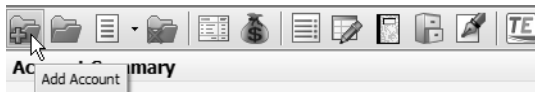
   Mini Procare is limited to 60 accounts (families) at a time. See article KB0412 at ProcareSupport.com for details.

2. Type an *Account Key* (up to 8 characters) used to alphabetize this family. Use the first few letters of their last name and perhaps a first initial (see sidebar). If they have more than one last name, make the *Key* match the name of the primary contact person for this family.

   Possible Duplicates: If the *Account Key* matches an existing account, a "possible duplicates" alert appears. Click the alert to see those accounts.

3. Click the *Add* button to add "payers" to this account. The payers are the parents, guardians or other persons who are financially responsible for this account.

Log Sheet Types are the categories available when you record information on the *Log Sheet* of an account, child, employee or vendor. Create your own types like Parent / Teacher Conference, Scheduling, Billing, etc.

Online Registration! Let new families register online with MyProcare. See article KB0610 at ProcareSupport.com.

2 Families - Same Name: When two families have the same last name it's best to add a parent's first initial to their *Account Key* to more easily tell them apart. Use HARRJ for the John Harrison account, rather than just HARR.

Hint: When entering new people, click directly on the *Add* button. To add someone already in the system, click the tiny down arrow on the *Add* button and choose *Add Existing Person*.

Learn more about *New* & *Existing* persons. See page 12 sidebar.

4. Enter data on the *Person Information* screen.

   a. Enter the name, DOB, gender, email, etc., as desired. The only required fields are first & last name.

      Note: The email address entered for this person may be used by them to log into *MyProcare* (page 98).

   b. Under *Address Information* click *New* and enter their address, then click *Update*. You may enter more than one address, just click *Update* after each one, then click *Exit* to return to the *Person Information* screen.

      Hint: To change an existing address or phone number dbl-click anywhere in the address or phone box.

   c. Under *Phone Information* click *New*, choose a *Telephone Type* (like work, home, or cell), then enter the *Area Code* and *Telephone Number* and a *Comment* (optional) then click *Update*. You may enter more than one phone number, just click *Update* after each one, then click *Exit*.

   d. To add a *Photo* see page 41.

5. Once the basic information for this person has been entered click *Continue* (lower right).

6. If anyone with a similar name, address, or phone number is found, the *Person Reconcile* screen will appear (image next page); otherwise, skip this step.

Learn about deleting an Account or Child. Search ProcareSupport.com for articles KB0085 and KB0091.

Set Up Text Messaging: Search for article KB0406 at ProcareSupport.com.

If the *Person Reconcile* screen appears, there are two options:

- One of the possible duplicates is indeed the same as the person you are trying to enter (meaning they are already in your system). If so, continue with step "a".

- Or, none of the duplicates are a match (meaning the person you are trying to enter truly is a brand-new person). If so, continue with step "b".

a. Select a suggested "possible duplicate" person as a match (top half of screen) and then click *Select* (upper right).

There may be information to reconcile between the two people. If so, choose the address(es), phone number(s) and email you wish to keep and click *Continue*. You'll return to the *Person Information* screen where you may make any changes, then click *Save > Exit*.

b. Or, select the person you just entered (bottom half of screen) and *Save* them as a new person.

Divorced parents should be entered as two separate accounts with the child assigned to both accounts. Each parent will be the *Primary Payer* for their own account. Search ProcareSupport.com for article KB0155.

Hint: Use Copy & Paste to duplicate address and phone info to other family members, like a spouse who is a secondary Payer.

• Select an address, click *Copy*.

• Select a phone, click *Copy*.

• Go to the other person.

• *Paste* the address.

• *Paste* the phone.

7. At the *Add Account* screen, your new person is shown under *Payers*. Continue adding payers as needed for this family (see sidebar hint). Use the *Up & Down* arrows to change their order. The first person on the list is considered the *Primary Payer*.

8. Click *Save > Exit.*

Edit Account Information

You may edit an account to add or change payers, mark the account as "hidden", enter a comment or alert, assign agencies, etc.

1. Look up the family (page 41) at the main screen of Family Data & Accounting.

2. On the Account toolbar, click the *Edit Account* icon (folder).
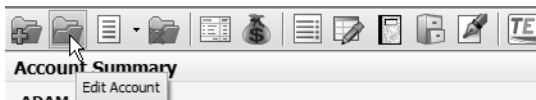
3. At the *Edit Account* screen, make any necessary changes.

4. Click *Save > Exit*.

Edit a Person

Dbl-click a person's name to edit basic information like name, address, phone and email. This is true in all modules for all types of people: payers, children, related people, employees, etc.

Primary Payer - John Harrison
1109 Southlawn Ave.
Apt 212
Grants Pass, OR 97527

Add Children to an Account

1. Begin at the main screen of Family Data & Accounting. The family to whom you want to add children should be displayed.

    Note: If you have just added a new account (family) they will already be displayed. If you want to add children to a different account you'll need to look them up (see page 41).

2. Click the *Add Child* icon (person with the plus (+) sign) on the child toolbar. To add someone already in the system click the tiny down arrow and choose *Add Existing Person*.

3. Enter data on the *Person Information* screen.

    a. Enter the name, DOB, gender, email, etc. The only required fields are first & last name. To add a photo see page 41.

    b. (Optional) If the child has an address and/or phone number different from their parent / guardian enter that information the same way as when creating the account (page 29).

4. Once the basic information has been entered click *Continue*.

5. If anyone with a similar name, address, or phone number is found, the *Person Reconcile* screen will appear (page 30). If no match is found, you'll automatically return to the main screen of *Family Data* with the new child displayed.

Assign Classrooms & Link People to Each Child

1. Select a child (see sidebar).

2. Click the *Information & Relationships* icon (with the people) on the child toolbar.

Registration Tip: Download a printable registration form for families to fill out. Search ProcareSupport.com for "registration forms" (no quotes).

Delete a Family or Child? When a family leaves you'll need to keep their records for tax and reporting purposes. Just change the status of each child so they are no longer "Enrolled" (page 35). You may also mark the account as "Hidden" (page 32). Learn how and when to remove a family or child. See articles KB0085 & KB0091 at ProcareSupport.com.

Select a Child: If you have just added a new child they will already be selected (their name will be highlighted). To select a different child in the same family click their name once. To work on a child in a different family you'll need to look them up (page 41).

Family Data

3. Import the Payers: The first time you add people you'll be asked if you would like to *Import Payers* (typically the parents or guardians). In most cases you'd want to say *Yes*.
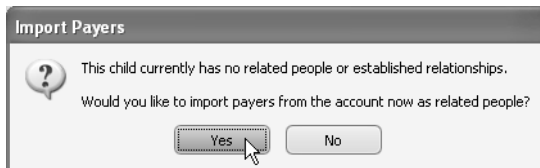
4. Add other people connected to this child such as a divorced parent, emergency contact, pickup person, doctor, etc. Click the tiny arrow on the *Add* button and choose to add a *New Person* or *Existing Person* (someone already in your database such as an employee or person in another family) or *Import From* another child in this family who has already been set up.
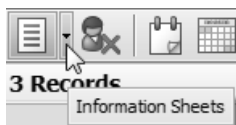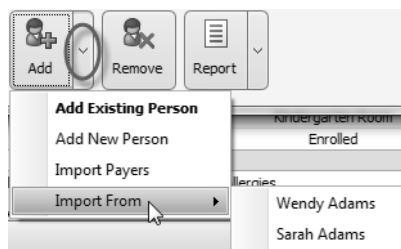

Print *Information Sheets* for the child or account directly from the main screen of Family Data. Just click the report icon (or tiny drop down arrow) on the child or account toolbar.

5. Choose how each person is related to the child from the *Relationship* list (like mom, dad, etc.).
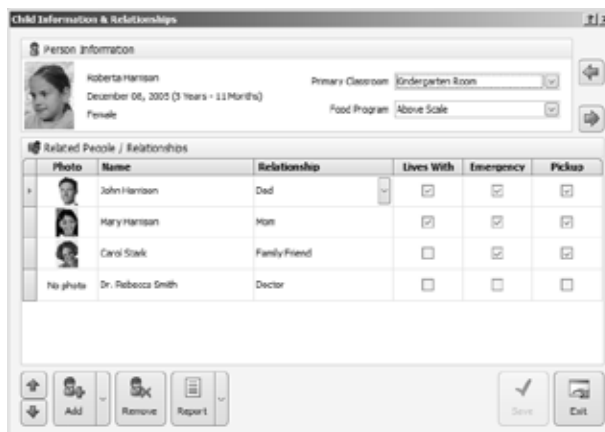
6. Check off who the child *Lives With* as well as *Emergency* contacts and authorized *Pickup* persons.

Note: The *Pickup* box must be marked in order for them to check children in. See Authorized Pickups (page 87).

7. Select a *Primary Classroom* for this child (upper right).

8. If you have the Meal Tracker module select a *Food Program* status (upper right) like Free, Reduced, or Above Scale.

9. Click *Save > Exit.*

   Hint: Use the *Report* button to print an *Information Sheet* for this child or use the toolbar icon (see sidebar page 34).

Child Enrollment Status

Each child must be assigned an *Enrollment Status*. Only children who are actively enrolled are included on reports like roll call sheets and procedures like automated *Contract Billing*.

1. Select a child (see sidebar page 33).

2. Click the *Enrollment Status* icon (calendar with the turned page) on the child toolbar.

3. Select a *Date* and a *Status* like *Enrolled* and click Save.

4. Enter any additional status levels you know at this time (clicking *Save* after each one) then click *Exit*.

Hint: Change *Enrollment Status* for many children at once - for example children who were on "Summer Break" are returning as "Enrolled" for the fall. Go to *Functions > Family Data > Batch Enrollment Status*. Search Procare-Support.com for article KB0128.

A child may be assigned more than one *Enrollment Status*, each with its own date. For example they may have registered today, but won't enroll until fall. You can even plan ahead for any known future periods of inactivity and enrollment.

Learn to create your own status levels (page 22).

Length of Enrollment

Hold your mouse over the child's enrollment status to see how long they've been at that status (how long enrolled, on the wait list, etc.).
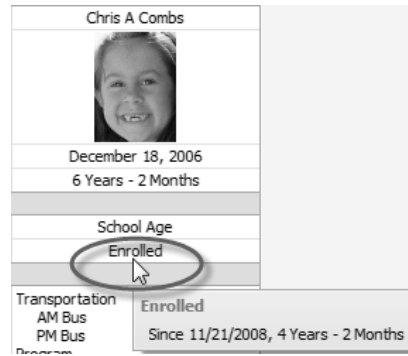
Non-Enrolled Children

Any child whose Enrollment Status is something other than "Enrolled" may be easily identified at a glance. On the main screen of Family Data, their name is shown in *italic* text with a slightly grayed background.

Child Schedules

Assign each child a *Schedule Template* you have previously set up (see page 20) or give them a *Custom Schedule,* then add *Exceptions* for days that fall outside the norm.

Assign Schedules to Children

1. Select a child (see sidebar page 33).

2. Click the *Schedule* icon (monthly calendar) on the child toolbar.
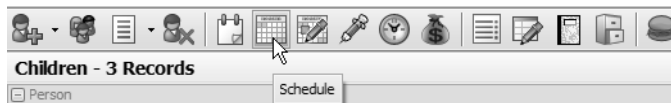
3. Click *New*. A blank *Child Schedule* appears.

4. Enter *Start* and *End* dates for this schedule (top right).

5. Choose a *Template* or enter a *Custom Schedule*.

   a.   To assign a template (or use one as a starting point) select it from *Schedule Name* list (where it initially says "Custom Schedule"). Next, make any changes needed for this child. When you make a change the connection to the original template is lost and the *Schedule Name* changes back to "Custom Schedule".

Family Scheduling: Let families choose schedules for their children at MyProcare.com. See article KB0615 at ProcareSupport.com.

Multiple Schedules: A child may be assigned more than one *Schedule*, each with its own *Start* and *End* dates—although the dates cannot overlap.

Schedule Name

Custom Schedule

Custom Schedule
Preschool 5 Days
Preschool M, W, F

Day	In
Mon	8:30 AM

Entering Time: Use the *Spacebar* to quickly enter time like 8 [spacebar] 30 [spacebar] A for 8:30 AM.
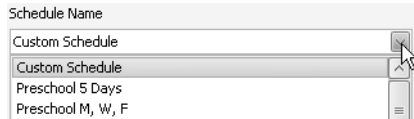
b.   Or create a *Custom Schedule* from scratch by manually se-lecting the *Classroom Name*, *Days* and *In / Out* times. See side-bar hint for entering time.

> Hint 1: Use *Save as Template* to turn a *Custom Schedule* into a reusable template.

✓
Save as Template

> Hint 2: Hold your mouse over the far left side of a line to see the total hours for that line.

Classroom Name

Preschool Room

Monday - 8:30 AM to 12:30 PM = 04:00

6.   When finished click *Save > Exit.* You'll return to the *Child Sched-ules* screen.

Child Schedules   [?][X]

Charlie Harrison

Name	Start	End	Weeks
PreK - Full Time	9/5/2008	6/11/2009	39
Summer M-W-F	6/15/2009	8/28/2009	10
AM Kindergarten - Full Time	9/1/2009	6/12/2010	40

New   Review   Delete   Print   Exit

⊟ Review

Use *Review* to see or *Print* a Child's Schedule. Sched-uled days are shown in bold. Click a day to see details for that day. Click the number next to a week (like week 39) to see the week at-a-glance.

7.   Click *New* to add additional schedules or dbl-click an existing schedule to make a change. See sidebar for use of the *Review* button. When finished click *Exit*.

Schedule Overrides, Vacations & Absences
Use an *Override* or *Absence* when there is a one-time change to a child's schedule, for example they will be: in a different classroom, arriving at a different time, leaving early, on vacation, etc.
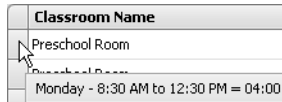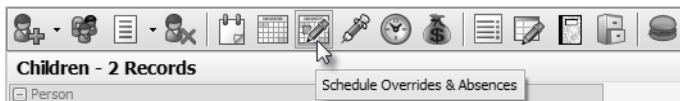
1.   Select a child (see sidebar page 33).

2.   Click *Schedule Overrides & Absences* on the child toolbar.

September					2012	
M	T	W	T	F	S	S
36 | | | 1 | 2 | 3 | 4 | 5 |
37 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
38 | 13 | 14 | 15 | 16 | 17 | 18 | 19 |
39 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
41 | 27 | 28 | 29 | 30 | | | |

Or, use *View Month, Day, Week* to toggle between different views.

Children - 2 Records

Schedule Overrides & Absences

⊟ Person

View Month

3. Enter the change on the *Overrides* or *Absences* tab.

Overrides	Absences	Balances			Charlie Harrison
Date	**In**		**Out**	**Classroom**	**Comment**
9/23/2009	7:30 AM		10:30 AM	Preschool Room	Arriving early
10/15/2009	9:00 AM		2:15 PM	PreK Room	Alternate room
11/4/2009	8:00 AM		11:00 AM	Preschool Room	Leaving early

a. Use *Overrides* when a child will be there at least part of the day, but the time or class is different. This may be appropriate if they are staying longer than usual, are coming on a day they are not normally scheduled, or will be in a different classroom. An *Override* completely replaces their schedule for the day and is not counted on the *Balances* tab.

> Hint: Process overrides (or absences) for many children at once, such as for school out days. Go to *Functions > Family Data > Batch Schedule Overrides & Absences*.

b. Use *Absences* when a child will be gone all or part of the day. This may be used for a doctor's appointment, vacation or other planned absence. The time of an absence is removed from their schedule, but the rest of the day remains intact. For example, a child might be scheduled from 9:00 am - 4:00 pm, but will be away from 1:00 - 2:00 pm for an appointment. Using an absence, the schedule would remain from 9:00 am - 1:00 pm and 2:00 - 4:00 pm. Absences are recorded on the *Balances* tab in order to track how much vacation time, etc. a child has used.

> Note: *Start* and *End* times for an *Absence* determine the number of hours counted on the *Balances* tab. If a child was scheduled five hours, but you wanted the absence to count as eight hours of their allowed vacation time, you could adjust the *Start* and *End* times accordingly.

4. Click *Save > Exit.*

Child Immunizations & Requirements

Record dates a child received each immunization or other date based requirement. The overall immunization schedule is set up as part of the System Configuration (see page 26).

1. Select a child (see sidebar page 33).

2. Click the *Immunization & Requirements* icon (syringe) on the child toolbar.

Children - 3 Records

Immunizations & Requirements

Use *Group* to arrange *Overrides* by the classroom or *Absences* by the reason.

Keyboard Shortcuts: Use the *Arrow* keys to move between immunizations and the *F4* key to add or change the date. Then tap *Enter* to *Save*. You may also *Tab* between the *Date*, *Exempt* and *Save* boxes.

3. Enter dates each item was received on the *Immunization* or *Requirement* tab.

> If a child is exempt from an immunization (or a shot in the series) just check the *Exempt* box instead of entering a date. You may also add a *Comment* to explain why the child is exempt.

Varicella

	Exempt from Varicella. Had Chickenpox.
Comment	
1	
2	3/5/2009
3	Exempt
4	

4. Click *Save > Exit.*

Immunizations Due

An immunization is due when either of two shot icons turns red.

- If any child in a family has something due a red shot icon will appear (upper right). Hold your mouse over the icon to see which children are due.

Immunizations & Requirements

Overdue Now
Paul Adams

- A red icon on the child toolbar means that particular child has something due.
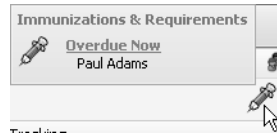
Tracking Items for a Child or Account

You may assign *Tracking Items* to each child or account as needed. *Tracking Items* are set up as part of the System Configuration (see page 23).

1. Select a child or account (sidebar page 33).

2. Click the *Tracking* icon (looks like a list) on the child toolbar (for child tracking) or the account toolbar (for family level tracking).

Tracking

3. Check off the items that apply to this child or account.

4. Click *Save > Exit.*

User Defined Fields for a Child or Account

Enter data in *User Defined Fields* for each child or account as needed. *User Defined Fields* are set up as part of the System Configuration (see page 25).

1. Select a child or account (sidebar page 33).

2. Click the *User Defined Fields* icon (grid with a pencil) on the child toolbar or the account toolbar as appropriate.

User Defined

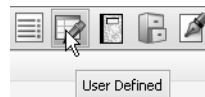3. Enter information in the fields that apply to this child or account, then click *Save > Exit*.

Child Tracking Items may be used for things like: bus runs, programs, activities, field trips, allergies, developmental milestones and whether certain forms or permission slips have been received.

What are *User Defined Fields* used for? Anything specific about a child or account that doesn't already have a place in Procare, for example, a date you need to record beyond the basic enrollment and birth dates.

These Account & Child Level Items work the same for children and their families.

- Tracking Items
- User Defined Fields
- Log Sheets
- Photos
- Attach Documents

For example a *Tracking Item* may be assigned to the family as a whole (account tracking) or to a particular child (child tracking).
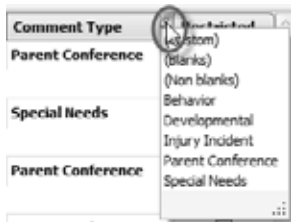
Tip: Use the tiny *Filter* icon in the header (like *Comment Type,* etc.) to view certain logs on screen.

Log Sheets for a Child or Account

You may type notes in the *Log Sheet* of each child or account as needed. *Log Sheet Types* are set up as part of the System Configuration (see page 28).

1. Select a child or account (sidebar page 33).

2. Click the *Log Sheet* icon (looks like a lab book) on the child toolbar or the account toolbar as appropriate.

Make a New Note

a. Click *New* (bottom left).

b. Choose the *Log Type* (like Progress Report, Injury Incident, etc.) from the drop down list at the top.

c. Type the content of the note.

d. Optional: Mark the note as *Restricted* (top right) if you want more control over who may view it.

e. Optional: Place a check in the *Show in MyProcare* box (top right) to allow parents to see this note online (available to Procare Cloud customers only - see page 98).

   Note: *Restricted* logs cannot be displayed in MyProcare.

f. Click *Save > Exit.*

View or Edit an Existing Note

a. Scroll up/dn to find the log you want. You may use the *Filter* to view certain types of logs (see sidebar).

   Hint: Click the plus sign (+) or minus (-) next to the author's initials (the *Identifier*) to show/hide details of a particular log.

b. Dbl-click the log note to open it for review or editing.

c. After making a change click *Save > Exit.*

Attach a Document to a Child or Account

Click the *Documents* icon (filing cabinet) on the child toolbar (or account toolbar) to attach files in .pdf format to an individual child or the family as a whole. This allows you to keep an electronic paper trail of important documents such as a copy of their registration paperwork, rate sheet agreement, state agency forms, etc. For details search ProcareSupport.com for articles KB0220 and KB0474.
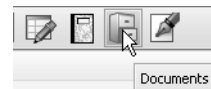
Add a Photo to a Person

Photos may be imported from a folder or any connected device, like a USB flash drive, digital camera, SD memory card, etc.

1. Look up a family or child (page 41) or an employee (page 120).

2. Dbl-click a person's name to open their *Person Information*.

   For authorized pickups, etc., you'll first click the *Information & Relationships* icon on the child toolbar to see their name.

3. Dbl-click the *Photo* box (top right) where it says "No photo". To change an existing photo, dbl-click directly on the photo.

4. Click *Import Image* and browse to the folder (or other location on your computer) where the image is located. Dbl-click the image to open it in the *Photo Editor*.

5. Crop the image.

   a. Click once on the image to display a white cropping rectangle. You'll want the face to fit inside this rectangle.

   Hint: Zoom in / out to adjust the image so the face is the appropriate size.

   b. Drag the rectangle so it is centered on the face and click the *Select* button. You'll return to the *Person Information* screen with the photo displayed (see sidebar tip).

6. Click *Save* > *Exit* to leave the *Person Information* screen.

Look Up, Search and Filter Accounts

Once your basic family and child information has been entered, you'll want to know how to look up a family, search for a person, and use the filter feature to view only certain accounts (families).

Look Up an Account

The easiest way to look up a family is to use the list of *Accounts* (left side of screen). Families are displayed alphabetically based on their *Account Key* (see sidebar).

1. Type the first few letters of their *Key* (typically their last name) in the *Key Filter* box (upper left).

2. Click the account you wish to work on.

Tip: Choose *Export Photo* to save the cropped version for use outside of Procare.

Sort by Name or Balance: Click the *Key* header to sort alphabetically. Click the *Balance* header to sort by amount due. Click the header a second time to sort in reverse order.
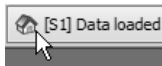
Shortcuts: Dbl-click the *Key* to open the *Account Info* screen for that family or dbl-click the *Balance* to open the *Ledger Card*.
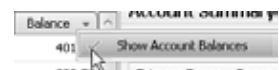
To hide the balance right-click the *Balance* header and uncheck *Show Account Balances*.

Search for a Person at *this* Location

1. Click the *Search* button (binoculars) on the toolbar.

2. Choose the type of person or thing you want to find (child, payer, other relationship to child, address, phone or email).

3. Type in the thing for which you are searching (the person's name, address, phone or email) and click *Find*.

4. Dbl-click the person's name in the *Results* to go to that account.

Search for a Person across *all* Locations

If you have multiple locations this procedure searches all locations at once.

1. From the *Utilities* menu click *Search All Locations,* then choose an *Account Search* (person connected to a family) or *Employee Search*.

2. Choose the type of person or thing you want to find (child, payer, other relationship to child, address or phone).

3. Type in the thing for which you are searching (the person's name, address or phone) and click *Find*.

4. People who match your criteria will be displayed showing the *School Name* (location) where they may be found.

5. Dbl-click the person's name (or use the *Go To Account* button) to go directly to that location and account.

Hint: To quickly change locations dbl-click the schoolhouse icon in the lower left of Family Data & Accounting, etc.

A **Red Filter** means only certain families are currently displayed.

Filter Your Accounts

1. To view only certain types of families on screen, click the *Filter* button (looks like a funnel or coffee filter) on the toolbar.

2. From the *Filter by* list choose whether you want to select families based on *Account* (family) level information or *Child* information.

3. Choose whether to include families from *All Accounts* or just *Visible* or *Hidden Accounts*.

4. Then, pick categories of families or children to include. You may combine multiple categories.

> Example 1: All children enrolled as of a particular date who are currently assigned to a certain Primary Classroom.

Hidden Accounts are displayed in *italics*, but you'll only see them if your filter is set to include *All Accounts* or *Hidden Accounts*.

Example 2: All accounts with a balance above a particular amount who also have certain Account Tracking items.

5. Click *Count* (optional) to see how many families or children meet your criteria.

6. Click *Exit*. Only families that meet your criteria will be displayed and the filter will turn red (see sidebar).

> Note: Filter settings are saved when you log out or exit Procare. Settings are saved separately for each Procare User. If you prefer that your filter not be saved go to: *Procare Home > Configuration > User* and uncheck "Store My Filter Settings".

7. To clear your filter and return to the default settings for your location, click *Clear Filter* (with the red circle/slash) on the toolbar.
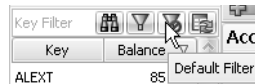
> The *Default Filter* is set as part of Region & School Options. Search ProcareSupport.com for article KB0202.

Refresh the List

Sometimes you may wish to click the *Refresh* icon to be sure you are viewing a current list of families who should be included in your filter. This makes sense if you have other people entering families into Procare or making changes from another computer.
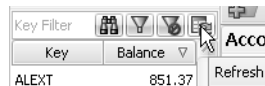
> Example: Four families are displayed based on your filter. Someone else changes another family so they would now be part of your filter. You may not see the 5th family until you click *Refresh*.

Email & Text Messages

Right-click a person's email address to copy it, copy a group of email addresses for use outside of Procare, or choose one of several ways to send email or text messages through Procare. Search for the following articles at ProcareSupport.com.

*   Email Settings (article KB0201)
*   Copy or Export Email Addresses (article KB0243)
*   Send Email to Parents, Employees, Vendors (article KB0242)
*   Send Text Messages (article KB0406)
*   Email a Letter with Letter Merge (see page 44)
*   Email Statements - Requires Family Accounting (article KB0237)
*   Manage Email & Texting Addresses (article KB0260)

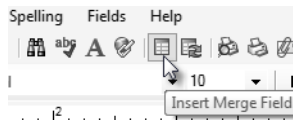# Letter Merge / Word Processor

Use the Merge Letters feature to print or email letters for your accounts and insert fields like their first name, last name, address, and balance due.

Create a New Letter

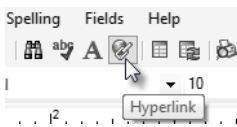1. Click the *Merge Letters* icon (looks like a fountain pen) on the account toolbar.

2. A blank letter appears. Begin typing your letter and insert data fields as needed. Use the *Insert Merge Fields* icon on the toolbar.
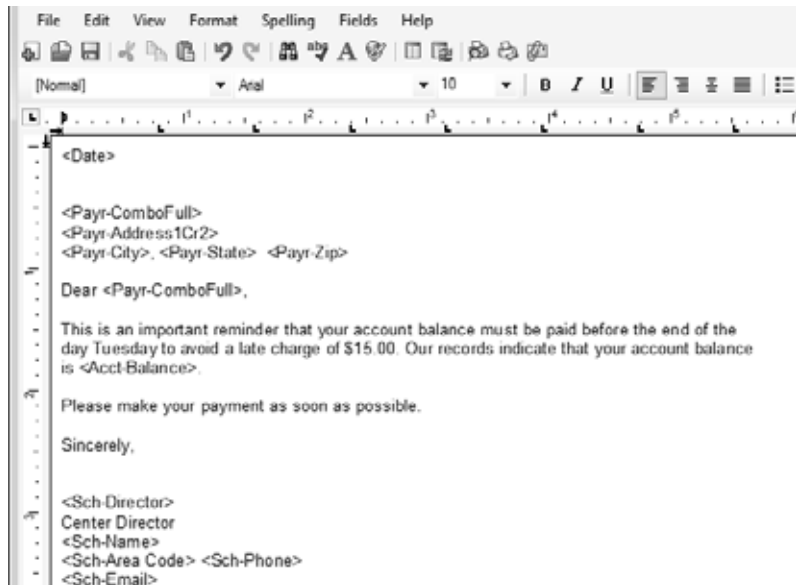

Hint: you may insert a link to a web page. Just be sure to include the full "Link to" address beginning with "http://"

Example: To start your letter by saying "Dear Greg & Maria Adams", you'd type the word "Dear", then insert the combined names of the payers so it looks like this: Dear <Payr-ComboFull>,
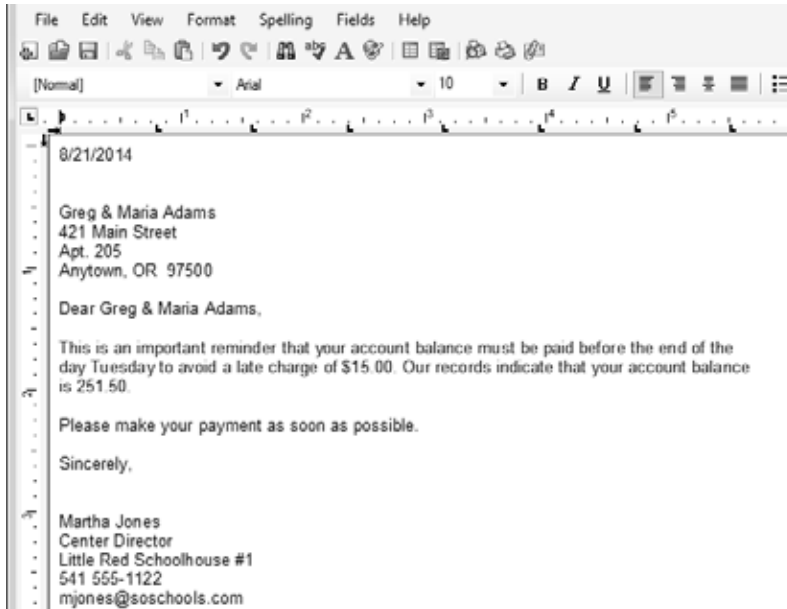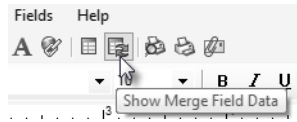
Your completed letter might look like this with the fields inserted (see sidebar hint).
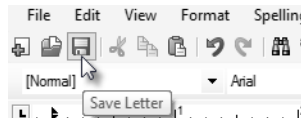
To display the actual information (parent names, etc.), use the *Show Merge Field Data* icon on the toolbar.

Fields   Help

A ✒ | ▦ ▦ | 🖨 🖨 🖾

▼ 10 ▼ | B *I* U

Show Merge Field Data

File   Edit   View   Format   Spelling   Fields   Help

🖨 🖿 🖺 | ✂ 🗐 📋 | 🔄 🔁 | 🔍 ᵇᵧ A ✒ | ▦ ▦ | 🖨 🖨 🖾

[Normal]   ▼ Arial   ▼ 10   ▼ | B *I* U | 🖺 🖺 🖺 🖺 | ▤

8/21/2014

Greg & Maria Adams
421 Main Street
Apt. 205
Anytown, OR 97500

Dear Greg & Maria Adams,

This is an important reminder that your account balance must be paid before the end of the day Tuesday to avoid a late charge of $15.00. Our records indicate that your account balance is 251.50.

Please make your payment as soon as possible.

Sincerely,

Martha Jones
Center Director
Little Red Schoolhouse #1
541 555-1122
mjones@soschools.com

3. When your letter is complete, click *Save Letter* on the toolbar and give the letter a *Name* and *Description*.

File   Edit   View   Format   Spelling

🖨 🖿 🖺 | ✂ 🗐 📋 | 🔄 🔁 | 🔍 ᵇ

[Normal]   ▼ Arial

Save Letter   1 . . . . ²

Tip: Add your logo (or any image) to a letter. Go to *Format > Insert Image*. See article KB0074 at ProcareSupport.com.

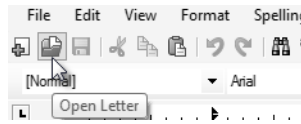4. To leave the *Merge Letters* screen, click *File > Exit* (or click the X in the upper right).

Select or Edit an Existing Letter

1. Click the *Merge Letters* icon (looks like a fountain pen) on the account toolbar.
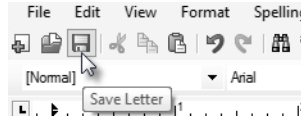
▤ 📝 🗒 🗒 🖋 | TE

Merge Letters

2. Click *Open Letter* from the toolbar*.*

3. Choose a *Letter Name* > click *Select*.

4. Make changes to the letter as needed and click *Save Letter*.

5. To leave the *Merge Letters* screen, click *File > Exit* (or click the X in the upper right).

Email or Print a Letter

1. Decide to whom the letter will be sent.

   a. If the letter will be sent to just one family, look up their account (see page 41).

   b. If the letter will be sent to many families, use the *Filter* to select categories of families to include (see page 42). You'll be able to choose individual families from the filtered list before sending the letter.

2. Click the *Merge Letters* icon (looks like a fountain pen) on the account toolbar.

3. Select the letter you want to send or create a new one as previously explained.

4. Click the *Print* icon or *Email* icon on the toolbar.
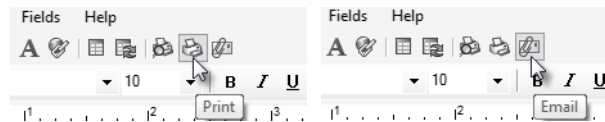
5. Choose the following, then click *Continue*:

   a. Will the letter be sent to the *Current Account* (one family only) or to *Selected Accounts* (those included in your filter)?

   b. For email choose who the *Email is From* (it may say "Using Local Outlook Account"), then enter a *Subject* line and a *Message* to explain the content of the email, for example "A notice regarding your current balance is attached." (See sidebar).

Before sending email you must set up *Email Options*. Search ProcareSupport. com for article KB0201.

Email letters are sent as attachments in .PDF format. Be sure to include a *Subject* line and *Message* so the recipient will know what the email is regarding.

   c.   For a printed letter select the *Printer*.

6. Choose the people to include, then click *Email* (or *Print*). You may also wish to check *"record in customer log"* (lower left) to place a note of having sent this letter in each family's *Log Sheet*.
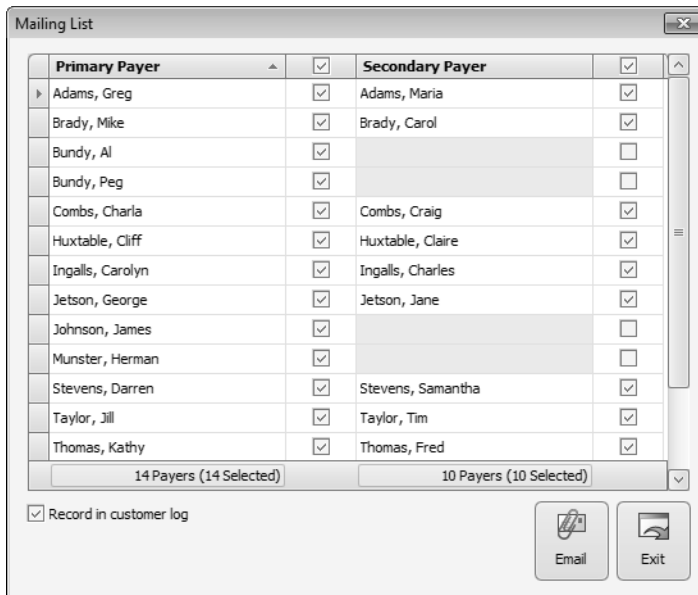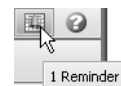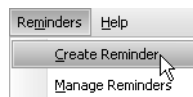

Note: If you're using Outlook you may get a message saying a program is trying to send email on your behalf. Be sure to answer *Yes*. See related article KB0185 at ProcareSupport.com.
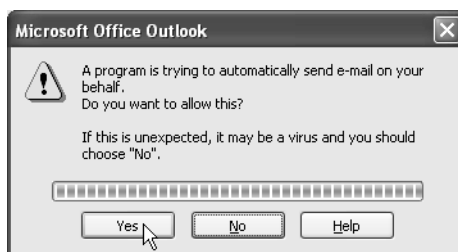
Reminders

Use the *Reminder* to help remember things like appointments, meetings, etc. Create reminders for yourself or others who are at or below the User Group level to which you are assigned.

Hint: When a *Reminder* for the current day is active a calendar with a bell appears in the upper RH corner of the screen. Just click the *Bell* to view your reminders.

1. (Optional) If this reminder is related to a particular family, child or employee, look them up (page 41).

2. From the *Reminders* menu click *Create Reminder*.

3. Select a *Reminder Date*, the date this reminder will be activated.

4. Choose a *Recipient*, the person who will see this reminder.

5. In the *Regarding* box enter who or what this item is regarding. If it is related to the family, child or employee whose name is displayed (behind the reminder), you may right-click the *Regarding* box and choose *Paste Information*.

6. In the *Comments* box type any other details about what you want to remember.

7. Click *Save > Exit*.

> For details on how to view and manage reminders search ProcareSupport.com for article KB0162.

Family Data Reports

Family Data Reports include things like roll call sheets, birthday lists, immunization and scheduling reports, etc.

From the main screen of Family Data & Accounting:

Press *Ctrl+F* on your keyboard to open the search box on most Procare screens. This is especially helpful to search reports; for example, type "enroll" to find enrollment reports.

1. Click *Reports* (upper left) > *Standard Reports*.

2. Several primary categories of reports may be listed like Family Data, Family Accounting, etc. Click the plus sign (+) next to *Family Data* to expand the list.

3. Secondary categories of reports will be shown such as Account Tracking, Child Tracking, Sign In/Out Sheets, etc. Click the plus sign (+) next to a category, like *Sign In/Out Sheets*.
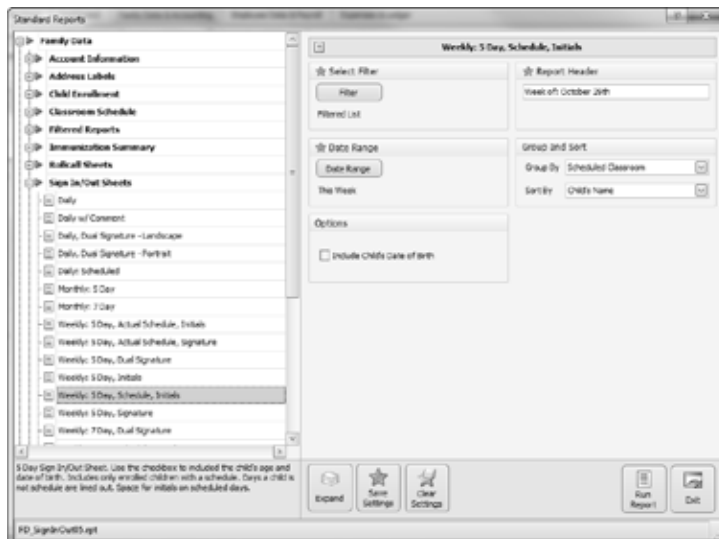
A System Supervisor may control which reports appear on the list and the order in which they appear. See article KB0072 at ProcareSupport.com.

4. Various types of reports may be shown within the category (see sidebar). Select the report you wish to run such as the *"Weekly:*

M-F, Schedule, Initials" sign in sheet. A brief description of the selected report will appear (lower left).

5.   Some reports have the following options:

a.   To include only certain children or families click the *Filter* button (right side) and select the criteria of your choice such as only children enrolled as of a certain date. You may also save these settings (see sidebar).

To use the same **Filter** and **Date Range**, etc., each time you run the report, click *Save Settings*. To remove them click *Clear Settings*.

b.   The *Report Header* prints near the top of the report and is useful on things like rollcall sheets to indicate the week.
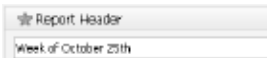
c.   You must select a *Date Range* (right side) on certain reports such as those that include child schedules. Choose dates that makes sense for the report. For a weekly report select the appropriate week.
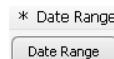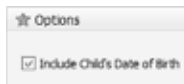
d.   *Group & Sort* is available on some reports. You may *Group By* a category, like *Primary Classroom*, to control the page break (each class on a separate page). Choose to *Sort By* an item, like *Child's Name*, to list children alphabetically.
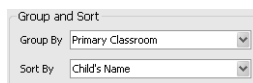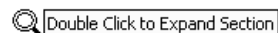
Hint: To get an alphabetical list that is not broken down by classroom choose to *Group By* "None" and *Sort By* "Child's Name".

e.   *Include Child's Date of Birth* is available on some reports, like roll call and sign-in sheets.

6.   Click *Run Report* (lower right).

7.   At the *Report Viewer* screen (see sidebar hint) you may:

Hint: On some reports you may see the phrase "Double-click to expand section" when you hover over an item on the *Report Viewer* screen. Just dbl-click to get more detail on that item.

a.   Email the report using the envelope icon (top left).

b.   Export the report (2nd icon from left) to another format, like a spreadsheet, word processor or PDF file.

c.   Print the report (3rd icon from left).

d.   Copy text selected on the report (4th icon from left).

e.   Use the left and right arrows to move through the pages.

f.   Go to a specific page by typing in the page number.

g.   Search for text on the report using the plain binoculars.

h.   Zoom in and out using the binoculars with plus sign.

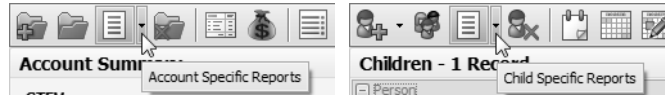8.   To close the report click the X in the upper right corner.

Family & Child Reports

Some family and child specific reports may be run directly from the main screen of Family Data using the report icons on the account or child toolbars.

Data Viewer

Use the *Data Viewer* to create lists from data fields you select such as name, date of birth, classroom, etc. Print the list or export it to a spreadsheet (or other format) to manipulate outside of Procare. Search ProcareSupport.com for article KB0180.
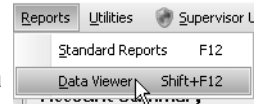
Getting Started with

Family Accounting

Family Accounting is the place to track all charges, payments and credits for families as well as to set up recurring fees and run automated billing procedures.

In Family Accounting you'll also generate financial reports for your business, easily track the amount each family owes, and print statements and receipts for families as well.

Configure Family Accounting

Before entering accounting information for individual families, you'll need to configure the overall "*Accounting Management*" settings that affect all families, like tuition categories and standard rates.

Assets, Bank Accounts, Deposit Accounts

Begin by setting up your bank accounts (checking, savings, etc.) as *Assets* in the *Chart of Accounts*. You'll then choose which assets are actual bank accounts and to which of those you will deposit funds.

Chart of Accounts

The *Chart of Accounts* organizes financial information into categories like assets, revenue and expenses. For example your checking account is an asset, tuition charged to a family is revenue and money spent on supplies is an expense.
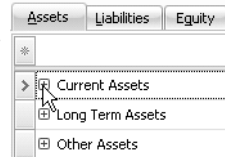
Start by giving your bank account assets the appropriate names.

1. From the *Procare Home* screen click *Configuration > System.*

2. Go to *Accounting Management* > dbl-click *Chart of Accounts.*

3. The *Assets* tab should already be selected. Click the plus sign (+) next to *Current Assets* to expand the list.

4. *Account Number* 1000.00 is typically used for your main checking account. Change the *Account Name* to something that makes sense for you, like "First National: Checking".

5. Add any other accounts you typically deposit funds to like savings or a money market account, etc.

    a. Click the top (blank) line that says "Click here to add a new Account". Enter an *Account Number* and *Account Name*, then tap *Enter* (on your keyboard) a couple of times until a new (blank) line appears.

    b. Continue adding other accounts as needed.

Learn more about using the Chart of Accounts. Search ProcareSupport.com for article KB0051.
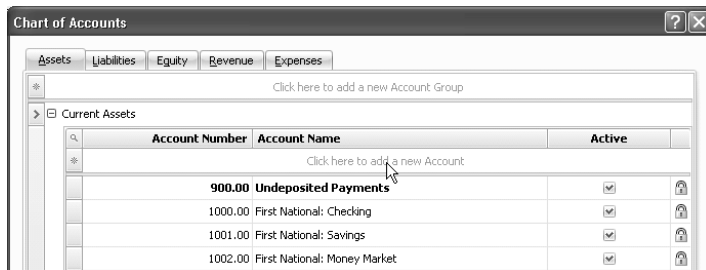
6. Use the *Up & Down* arrows to change their order, then click *Save > Exit*.

Choose Bank Accounts

Next, select the assets you just set up as actual bank accounts.

1. Begin at the *System Configuration* screen with the *Accounting Management* section opened.

2. Dbl-click *Bank Accounts*.

3. If your new assets are not already listed add them by clicking the top (blank) line and select them, one at time, from the drop down list of *Account Numbers*. Next, tap *Enter* a few times until a new blank line appears.

> Note: If this is a checking account (and you'll be issuing checks from Procare) mark the appropriate box and enter the last used check number.

4. Use the *Up & Down* arrows to change their order as needed, then click *Save > Exit*.

Select Deposit Accounts

Now choose *Deposit Accounts* from your list of *Bank Accounts*. These are accounts to which you may deposit payments received.

1. Begin at the *System Configuration* screen with the *Accounting Management* section opened.

2. Under *Family Accounting* dbl-click *Deposit Accounts*.

Deposit Accounts

Deposit Accounts

Reminder: A Schoolhouse means an item is "local". If you have more than one location it only affects the one you have selected.

Change School

To change locations click once on an item to select it (like *Deposit Accounts, Standard Amounts,* etc.). Then click *Change School* and choose a location.

Account Assignments

Learn about *Account Assignments*. Search Procare-Support.com for article KB0058.

Deposit Accounts will be available later when you do *Deposit Reports*. Funds you deposit may be divided among these accounts, for example some to checking and some to savings (page 68).

3. Place a check next to the accounts you want available for use as *Deposit Accounts*.

4. Click *Save > Exit*.

Charge & Credit Descriptions

There are several types of charge, credit and payment descriptions used for various purposes. For example, a charge description might be "Tuition - Infants" or "Late Fee", while a credit might be "Family Discount" and a payment could be "Pmt by Check" or "Pmt by Cash".

1. From the *Procare Home* screen click *Configuration > System.*

2. Go to *Accounting Management > Family Accounting >* dbl-click *Charge / Credit Descriptions.*

3. Click a tab at the top depending on what type of description you wish to work on like Tuition Charge, Other Charge (see sidebar).

4. To create a new *Description* click the top (blank) line and enter a name in the *Description* box like "Tuition - Infants". Assign it to a revenue account (like *4000.00 Tuition Charges*) under the heading *GL Account*, then tap *Enter* to create a new (blank) line.

    Note: *Special Charges & Credits* work differently (see sidebar).

Learn more about different types of charge, credit and payment descriptions. Search ProcareSupport.com for article KB0053.

Special Charges & Credits are used for deposits to hold a space for a child like a fall enrollment deposit. See article KB0203 at ProcareSupport.com.

Use the **Expose** button to change the locations that have access to each *User Defined Field, Global Tracking Group* and *Global Immunizations.*

5. The *Exposure* screen will automatically appear. Choose which locations have access to this *Group* and click *Save > Exit*. (See page 14 for more about exposure).

6. Use the *Up & Down* arrows to change the order if needed then click *Save > Exit*.

Standard Amounts

If most families are charged the same amount for a particular service, like "Tuition - Infants", then setting up *Standard Amounts* will save time when you assign rates to each child. This feature may also be used to change your rates (see sidebar).

1. Begin at the *System Configuration* screen with the *Accounting Management* and *Family Accounting* sections expanded.

2. Dbl-click *Standard Amounts.*

    If you have multiple locations remember to use the *Change School* button to set up Standard Amounts for each location.

3. Click a tab at the top depending on what type of description you wish to work on like Tuition Charge, Other Charge, etc.

4. Enter the *Amount* for any *Descriptions* like "Tuition - Infants" for which most families will be charged the same rate.

    Hint: If most families are charged weekly, enter the amount per week; if most are charged monthly, use the amount per month, etc. If the amount varies, leave it at zero.

5. Click *Save > Exit*.

Rate Changes: Use the *Update* button to change the amount for all children at once. Choose to update just the selected description or all descriptions. The new rate will be charged the next time you run *Automated Billing* (page 62).
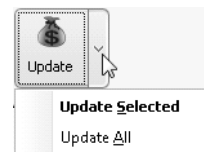
Billing Cycles

Billing Cycles, such as "weekly" and "monthly" are used for recurring fees charged to families or agencies.

1. Begin at the *System Configuration* screen with the *Accounting Management* and *Family Accounting* sections expanded.

2. Dbl-click *Billing Cycles.*

    a. Click the top (blank) line to add a new cycle. Enter a *Description* and *Comment* (optional) then tap *Enter* (on your keyboard) a couple of times until a new (blank) line appears.

    b. Continue adding other cycles as needed.

3. Use the *Up & Down* arrows to change the order if needed then click *Save > Exit*.

    Billing Cycles are assigned to the *Billing Box* of each child. See page 60.

Use *Billing Cycles* if you charge a flat fee regardless of the hours a child actually attends.

Use *Billing Formulas* when charges vary based on attendance for things like hourly rates, overtime and late pick ups. Some centers use just *Cycles* or *Formulas* while others use both.

Billing Method Formulas

Billing Formulas require the Attendance Tracker module. Formulas allow fees to be based on a child's actual attendance or their schedule. Formulas are assigned to the *Billing Box* of each child (see page 60).

Let Procare Support help determine which formulas are most appropriate for your situation.

Creating your own formula from scratch is not recommended. Always use an existing formula as a template.

Standard formulas are included to accommodate typical situations like hourly rates, half day / full day, before & after school, overtime, extra days, late pick up and so forth (see sidebar).

Custom formulas may be created for a fee. See article KB0205 at ProcareSupport.com.

1. Begin at the *System Configuration* screen with the *Accounting Management* and *Family Accounting* sections expanded.

2. Dbl-click *Billing Formulas.*

Edit an existing formula:

a. Dbl-click the formula name like "Hourly / Daily (attendance)".

b. At the *Formula Builder* screen make any necessary changes, like changing the hourly rate.

c. Click *Save > Exit* to return to the list of *Billing Formulas* then click *Exit* again.

Create a New Formula:
Decide which of the existing formulas is closest to the new formula you wish to create. This will be used as a starting point for your new formula (see sidebar).

a. Click once on an existing formula to select it. This will be the "template" for your new formula.

b. Click *New Formula*. Answer *Yes* to use the selected formula as a template.

c. Give the formula a *Name* like "Infants - Hourly" and a *Description* like "Charge hourly based on attendance" then click *Save*.

d. The *Exposure* screen will automatically appear. Choose which locations have access to this formula and click *Save > Exit*. (See page 14 for more about exposure).You'll return to the *Billing Formulas* screen.

e. Dbl-click the name of your new formula to edit it.

f. At the *Formula Builder* screen make any necessary changes, like changing the hourly rate.

g. Click *Save > Exit* to return to the list of *Billing Formulas* then click *Exit* again.

Third Party Agencies & Adjustment Codes

Payments from subsidizing agencies like DHS, DFACS, DCFS, Head Start, etc. are managed using the optional Agency Accounting module. See article KB0529 at ProcareSupport.com.

Printing Receipts - Receipt Options

Choose settings for receipts to print when a payment is recorded.

1. Begin at the *System Configuration* screen with the *Accounting Management* and *Family Accounting* sections expanded.

2. Dbl-click *Receipt Options.*

3. To enable receipt printing:

    a. Check *Turn Receipt Printing On*.

    b. Select a *Format* (search ProcareSupport.com for article KB0068).

    c. Under *Tracking Item* select "All Tracking Items" to print receipts for all families. To choose a particular group of families select a tracking code called something like "Receipt Requested" and assign it to the appropriate families. (See page 23 for how to create *Account Tracking Items*).

    d. Check *Confirm Printing of Receipt* if you want to be asked whether to print each receipt.

    e. Check *Print Receipt Numbers* and enter the *Next Receipt Number* if you want receipt numbers on each receipt.

    f. Enter a *Message* (optional) to appear at the bottom of each receipt.

    g. Place a check next to the *Payment Descriptions* for which you want receipts to print such as Pmt by Cash, Pmt by Check, etc.

    h. Click *Save > Exit*.

Accounting for Individual Families

Family accounting revolves around three key elements:

- **Account Ledger Card** - Where the history of charges, credits, payments and the balance for each family or agency is recorded.

- **Child's Billing Box** - Where recurring charges are set up (page 60).

- **Automated Billing** - Which copies charges from the Billing Box to the Ledger Card (page 62).

Ledger Card

On the ledger card you may enter beginning balances, as well as payments, or any other individual transactions you wish to record.

Beginning Balances are important. They get each family started with their correct balance so you'll have complete accounting records for the year.

Beginning Balances

Each newly entered account (family) begins with a balance of zero. Start by recording the beginning balances and the total charged and paid so far this year, also known as year-to-date entries.

1. Look up the account (page 41).

2. Click the *Ledger* icon on the account toolbar.
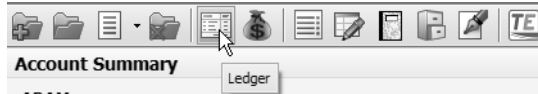
3. Enter the beginning balance (if any) from the end of last year (or the end of your prior fiscal year, if different). If their balance at that time was zero (or they had not yet enrolled) skip this step.

    a. In the *Description* column choose *Balance Forward*.

    b. Change the date to December 31st of the prior year (or the last day of your prior fiscal year, if different).

    c. Enter the amount owed as of that date. This will carry their balance into the new year.

    > Note: If they had a credit enter it as a negative amount.

4. Enter the total amount charged to this family so far in the current year. You may break it into multiple lines if this family has more than one child.

    a. Choose a *Description* for the first child like "Tuition Infants".

    b. Change the date to a convenient starting point. If you began

using Procare in October, make it the last day of September (see fiscal year note below).

c. Enter the total amount charged for that service so far this year.

> Fiscal year note: If your year does not start in January, you may need to make two entries—one up through last December, and a second from January until now. That way the calendar years are separated for reports, like family tax statements. Be sure to date the entries accordingly.

d. Repeat for other children in the family.

5. Enter the total amount paid by this family so far in the current year.

a. Choose a payment Description like "Pmt by Check".

b. Change the date to match the previous step.

c. Enter the total amount paid so far this year (see fiscal year note above).

> ⚠ Important: These year-to-date payments should be closed in their own separate Deposit Report (page 68).
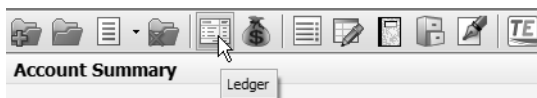
6. Click *Post & Exit*.

Ledger Card - Manual Entries

Often you'll use special tools (like Automated Billing, the Late Payment Calculator or Quick Ledger Posting) to record information to many ledger cards at once. However, it's good to know how to make individual entries too.

Post an Entry

1. Look up the account (page 41).

2. Click the *Ledger* icon on the account toolbar.

3. Enter the transaction:

a. Select a Description like "Tuition Toddlers", "Family Discount" or "Pmt by Check" as appropriate.

b. Today's *Date* will be automatically entered. Change the date if needed.

c. Type a *Comment* (optional) like the check number when a payment is made.

d. Confirm the *Amount* or type it in as needed.
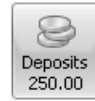
Track *Deposits* for summer, fall, etc. Search ProcareSupport.com for article KB0203.

Hint: If a Ledger entry was posted using *Formula Billing* (page 64), a summation symbol (Sigma) will appear on the line. Dbl-click the *Symbol* to view a summary of the hours and rate.
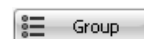
Use the *Group* button to organize Ledger Card items by their Description, like "Tuition Toddlers", "Pmt by Check", etc.

Note: The *Amount* will be entered automatically if the *Description* you selected has a *Standard Amount* (page 55). If you record a payment, the full amount due appears.

    e.   To continue adding additional items tap *Enter* (on your keyboard) until a new, blank line appears.

    f.   Click *Post & Exit*.

Void an Entry

1. Look up the account (page 41).

2. Click the *Ledger* icon on the account toolbar.

3. Void an item:

    a.   Click once on a line to select it.

    b.   Click the Void button.

    c.   Select a *Void Date* and enter a *Comment* if needed.

    d.   Click *Void*.

    e.   At the *Account Ledger* screen click *Post & Exit*.

Hint: See who voided an item (and the date & comment). Go to the Ledger, click once on the line to select it, then click the Void button.

See the *Void Date* and *Comment* on an item that has already been voided. Click once on the item to select it then click the *Void* button.

Change an Entry

The *User Group* to which you are assigned determines whether you can make changes to a Ledger Card. In most cases it's best to void items that were posted incorrectly rather than just changing them.

1. Look up the account (page 41).

2. Click the *Ledger* icon on the account toolbar.

3. Click the field you want to edit (*Date, Description, Comment* or *Amount*) and make your change.

4. Click *Post & Exit*.

Note: To change the void date of an item previously voided go to the Ledger Card, click once on the line to select it, then click the Void button. Change the Void Date or Comment as needed.

Use the *Audit* button to view a history of all changes on a Ledger Card.

Set up the Billing Box

The Billing Box is where recurring charges are set up for each child.

1. Look up the account (page 41) and click once on the name of the child to select them.

2. Click the *Billing Box* icon (money bag) on the child tool bar.

Divorced parents should be set up as two separate accounts with the child assigned to both accounts. Billing may then be split between the two. Search ProcareSupport.com for article KB0155.

3. If you have the Attendance Tracker module there will be two tabs, one for *Contract* billing and another for *Billing Formulas*. Otherwise *Contract* billing will be the only choice.

Contract Cycles

a. Select the schedule to which this item will apply (top left). Choose *Standard Billing (all Schedules)* or pick a particular schedule from the list.

Learn more about the Billing Box and how Cycles, Formulas and Schedules can work together. Search ProcareSupport.com for article KB0106.

```
Billing Applies to...
Standard Billing (all Schedules)
Future Schedule: 1/1/2010 - 5/31/2010
Future Schedule: 9/1/2009 - 12/31/2009
Current Schedule: 6/1/2009 - 8/31/2009
```

b. Click the top (blank) line to add a new item.

c. Select the *Ledger Card* of the person responsible for payment of this item. Typically either the Primary Payer (parent) or a subsidizing agency (see page 80 for agency set up).

d. Choose the *Cycle* for when this item is charged (weekly, monthly, etc.).

e. Choose a *Description* like "Tuition Toddlers", "Family Discount", "Co-payment Fee", etc.

f. Enter a *Comment* if needed to describe this item. It's not necessary to put the child's name in the comment box. You'll have the option to automatically include their name when you run the Automated Billing procedure.

g. Enter or confirm the *Amount*. If this item has been set up for a Standard Amount the amount will automatically be entered, although you may type over it as needed.

Family Discounts - Use a percentage as the *Comment* (like 10% older child) to automatically calculate the discount. Search ProcareSupport.com for article KB0204.

h. Click *Save*. A new blank line appears. Continue adding items as needed then click *Save > Exit*.

Hint: Add a contract billing line to many children at once with the *Batch Contract Billing* feature. Search ProcareSupport.com for article KB0526.

Billing Formulas

Use of formulas requires the Attendance Tracker module. Billing Formulas must be set up first (page 55).

a. In the child's Billing Box click the *Billing Formulas* tab.

b. Select the schedule to which this item will apply (top left). Choose *Standard Billing (all Schedules)* or pick a particular schedule from the list.

Use *Copy & Paste* to copy lines in the Billing Box from one schedule to another.

c. Click the *New Formula* button.

d. Select the *Ledger Card* of the person responsible for payment of this item. Typically either the Primary Payer (parent) or a subsidizing agency (see page 80 for agency set up).

e. Choose a *Description* like "Tuition Toddlers", "Family Discount", "Co-payment Fee", etc.

f. Choose the *Formula Name* used to determine the amount this item (hourly rate, late pick up, etc).

g. If the formula has *Variables* (such as the rate), enter the appropriate number(s) in the *Value* column.

h. Enter a *Comment* if needed to describe this item. It's not necessary to put the child's name in the comment box. You'll have the option to automatically include their name when you run the Automated Billing procedure.

i. Click *Save > Exit* to return to the child's *Billing Box*. Continue adding items as needed then click *Exit*.

Hint: Add a formula to many children at once with the *Batch Formula Billing* feature. Search ProcareSupport.com for article KB0527.

Contract Billing Summary

If you're using Contract Billing, the *Contract Billing Summary* (money bag) on the account toolbar displays totals for each cycle, including all children for the account. See KB0221 at ProcareSupport.com.
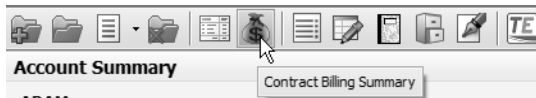
Automated Billing

There are several types of Automated Billing Procedures:

- **Contract Billing** - Charge all families with actively enrolled children their recurring weekly or monthly rates, etc. (page 63).

- **Formula Billing** - Requires Attendance Tracker. Charge all families based on each child's actual attendance, schedule, overtime, etc. (page 64).

- **Selected Account Billing** - Charge a selected group of families a one-time fee for something like a field trip or a particular week of summer camp (page 65).

- **Late Payment Calculator** - Charge a fixed amount or a percentage of each family's balance (page 66).

Contract Billing

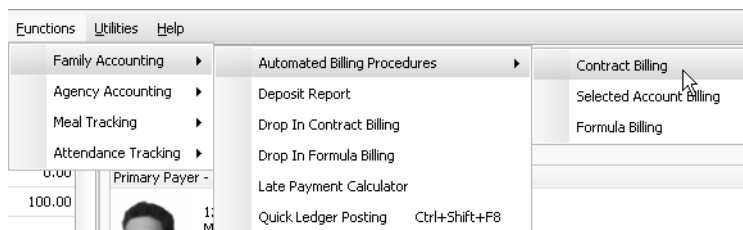Charge recurring fees and view or void a previous billing batch.

Do you have Drop Ins? Learn about the *Drop In Contract Billing* feature at ProcareSupport.com. Search for article KB0112.

Process Contract Billing

At the main screen of Family Data & Accounting:

1. Click *Functions > Family Accounting > Automated Billing Procedures > Contract Billing*.

2. Mark the Contract Cycle(s) you wish to process at this time like weekly or monthly.

3. Select a *Date* for *"All Children Enrolled As Of"*. This will include only actively enrolled children (see sidebar).

   Note: Their *Enrollment Status* as of that date must be "Enrolled" (page 35).

4. Choose a *Post Date*. This is the date the transaction will be recorded on the Account Ledger Card.

   If you are billing for next week you'd pick a date like next Monday to indicate the week for which you are charging.

5. Enter a *Comment* if needed. In most cases you'll leave it as [Comment] which will use the individual comment from each child's Billing Box.

   Check the box *"Include Child's Name in Comment"* if you want the name of each child to be part of the comment.

6. The *Amount Multiplier* is usually 1.00. This is the number of cycles (weeks, months) for which you are billing.

   Example: If you were billing for 2 weeks at once changing the multiplier to 2.00 would double the fees charged to everyone.

Automated Contract Billing copies recurring weekly or monthly fees from each child's Billing Box to the Ledger Card. Once Contract Billing is complete each family (or agency) will have a balance due on their account.

The "*Enrolled As Of*" Date and the *Post Date* should usually be the same.

Amount	Multiply	Total	☑
105.00	1.00	105.00	☑
125.00	1.00	125.00	☑

Place a check in the column header to select all accounts or click just to the right of the check box to sort according to which families are selected and which are not. Note: a grayed light bulb indicates a "hidden" account.

7. Click *Next*.

8. Select the accounts you wish to process (see sidebar) and make any necessary changes to the *Amount* column.

9. Click *Post*. Then *Exit*.

View or Void a Previous Contract Billing
At the main screen of Family Data & Accounting:

1. Click *Functions > Family Accounting > Automated Billing Procedures > Contract Billing*.

2. A list of recent billing batches will appear under the heading *Automated Contract Billing History*. Dbl-click a line to view or void.

Automated Contract Billing History

Posted	User	Items	Charges	Items	Credits	Voided
7/6/2009	peh	2	336.00	0	0.00	✎
6/5/2009	peh	3	1099.00	0	0.00	

3. At the *Batch Detail* screen you'll see all items that were part of that batch. If needed you may void the entire batch at once - just click *Void Batch*. A void will appear on each Ledger Card that was included in the batch.

4. Click *Exit* to return to the *Contract Billing* screen, then *Exit* again.

Formula Billing

Charge fees based on attendance and view or void a previous billing batch (requires Attendance Tracker).

Do you have Drop Ins? Learn about the *Drop In Formula Billing* feature at ProcareSupport.com. Search for article KB0113.

Process Formula Billing
At the main screen of Family Data & Accounting:

1. Click *Functions > Family Accounting > Automated Billing Procedures > Formula Billing*.

2. Mark the Billing Formula(s) you wish to process at this time like overtime or late pick up.

3. Choose a *Post Date*. This is the date the transaction will be recorded on the Account Ledger Card.

    If you are billing for last week you'd pick a date like last Friday to indicate the week for which you are charging.

4. Check the box *"Include Child's Name in Comment"* if you want the name of each child to be part of the comment.

5. Enter a *Date Range*. These are the dates for which you want to bill. For example, if you are charging late pick up fees based

on attendance for last week use last week as the *Date Range*.

6. Click *Next*.

7. Select the accounts you wish to process (see sidebar hint).

    > Hint: Place a check in the column header to include all accounts or sort accounts according to who is selected (see sidebar page 64).

8. Click *Post*. Then *Exit*.

View or Void a Previous Formula Billing
This is similar to viewing or voiding Contract Billing (page 64).

Selected Account Billing

Charge a one-time fee to all families that are part of a selected group and view or void a previous billing batch.

Process Selected Account Billing
At the main screen of Family Data & Accounting:

1. Click *Functions* > *Family Accounting* > *Automated Billing Procedures* > *Selected Account Billing*.

2. Use the *Select Filter* to choose categories of families to include. This billing filter begins by matching the filter currently selected at the main Family Data screen (page 42) although you may change it as needed.

3. Choose a *Post Date*. This is the date the transaction will be recorded on the Account Ledger Card.

4. Select a *Ledger Card* to be charged. In most cases this will be the *Primary Account Ledger* (for each family) although you could select a third party agency as needed.

5. Choose a *Description* for the charge, like field trip.

6. Enter an *Amount*. This will be the default amount for all selected families, although you'll be able to adjust it for particular families if needed. There may also be a *Split Amount* box (see sidebar).

7. Enter a *Comment* to further describe this item if needed.

    > Check *"Include Child's Name in Comment"* if you want the name of each child to be part of the comment.

8. Click *Next*.

9. Select the accounts you wish to process and make any necessary changes to the *Amount* column.

    > Hint: Place a check in the column header to include all accounts or sort by who is selected (sidebar page 64).

10. Click *Post*. Then *Exit*.

Billing Formula Print Statements

Standard
7/5/2009 - 7/11/2009
Rate: 6.2500
Attend: 31 Hrs 32 Min
Drop In Date: 05 Jul 2009
Billed: 06 Jul 2009

Hint: Dbl-click the *Amount* (or anywhere on the line) to view a summary of the hours and rate.

Account Batch   Child Batch

An *Account Batch* is when you select family based criteria like "Family Tracking" or "Balance". A *Child Batch* is when you select child based criteria like "Classroom" or "Child Tracking".

Amount
150.00   ☑ Split Amount

The *Split Amount* box appears when you *Select* a child based criteria like "Child Tracking". If a child is assigned to more than one account (divorced parents, etc.) the amount will be split between them. Uncheck the box and the full amount will be charged to each account.

View or Void a Previous "Selected Account Billing"
This is similar to viewing or voiding Contract Billing (page 64).

Late Payment Calculator

Use the Late Payment Calculator to charge a fixed amount or a percentage of the past due balance on each family account.

Process Late Payment Fees
At the main screen of Family Data & Accounting:

1. Click *Functions > Family Accounting > Late Payment Calculator*.

2. Choose a *Post Date*. This is the date the transaction will be recorded on the Account Ledger Card.

3. Choose a *Description* for the charge like "Late Payment".

   Hint: Set a default description at the *School Options* screen. See article KB0030 at ProcareSupport.com.

4. Enter a *Comment* to further describe this item if needed.

5. Select accounts and specify amounts:

To always charge a percentage leave the amount field at zero. To always charge a flat amount leave the percentage at zero.

Account Selection		
Select all accounts with a balance...		
greater than	50.00	as of 7/6/2009
Charge	5.00	% of their balance
or an amount of	10.00	whichever is greater.

   a. Enter a balance and an "as of" date.

   Example: You may want to charge everyone with a balance over $50 as of Monday the 1st. To charge all accounts who owe you money enter a balance of zero.

   b. Enter a percentage and/or a fixed amount to charge. The higher of the two will be charged, such as 5% or $10 (see sidebar).

6. Click *Next*.

An account shown in *Italics*, with a grayed light bulb, indicates a "hidden" account.

Late Payment Calculator

Accounts with a balance greater than 50.00 as of 8/26/2009

Account △	Payer	Balance	Charge	☑	
ALEXT	Terrie Alexander	110.00	10.00	☑	
BRULM	Morgan Brullee	450.00	22.50	☑	💡
HARRB	Brent Harrison	374.00	18.70	☑	
HARRJ	John Harrison	242.75	12.14	☑	
SMITHM	Mary Smith	275.62	13.78	☑	

7. Select the accounts to process, click *Post* and then *Exit*.

   Hint: Place a check in the column header to include all accounts.

View or Void a Previous Late Payment Batch
This is similar to viewing or voiding Contract Billing (page 64).

Payments & Bank Deposits

The following tools will help record payments from families and manage bank deposits.

- **Ledger Card** - You may manually post a payment to the Ledger Card of a particular family just as you would record any other type of entry (page 57).

- **Quick Ledger Posting** - This tool let's you quickly post payments from many families (page 67).

- **Deposit Reports** - Specify which payments you'll deposit and divide deposits between multiple bank accounts (page 68).

Additional software and services:

- **Tuition Express** - Collect family payments electronically. Recurring payments may be tied to a bank account or credit card. Also handles instant point of sale payments (page 72).

- **Agency Payments** - Payments received from third party agencies are managed using Agency Accounting (page 85).

Quick Ledger Posting

Although Quick Ledger Posting may be used to record charges or credits (when the amount varies from family to family), it is most often used for payments, especially when you have a stack of checks to enter (see sidebar).

At the main screen of Family Data & Accounting:

1. (Optional) Use the *Filter Accounts* feature to start with a particular set of families selected (page 42).

2. Click *Functions > Family Accounting > Quick Ledger Posting.*

3. Begin with the first family whose payment (or other transaction) you wish to record. Type their *Account Key* (the first few letters of their last name) in the *Account List* box. If you have several families with similar names, click the appropriate one on the list to select them.

4. Choose a *Post Date*. This is the date the transaction will be recorded on the Account Ledger Card.

5. Choose a *Description* like "Pmt by Check".

6. Enter a *Comment* (usually the check number).

7. Confirm the *Amount* (type over it if needed) and click Post.

8. Type the *Account Key* of the next family and continue until all

Time Saver Tip #1
Quickly move through a stack of checks.
- Type the *Account Key*
- Tab to the *Comment*
- Tab to the *Amount*
- Tab to the *Post* button and tap *Enter*

☑ Maintain Comment
☑ Maintain Amount

Time Saver Tip #2
If the *Comment* and/or the *Amount* are the same for multiple families check the boxes for *Maintain Comment* or *Maintain Amount*.

payments (or other transactions) have been posted.

9. Click *Exit*.

Deposit Reports

Manage *Deposit Reports* and view or change a previous deposit.

Manage Your Current Deposit Report
To use the *Deposit Report* feature you must have configured *Deposit Accounts* (page 53) and posted payments (page 67).

At the main screen of Family Data & Accounting:

1. Click *Functions > Family Accounting > Deposit Report*.

2. At the *Deposit Reports* screen under the *Current Deposit Report* section (lower left) you may:

   a. Click the *View* button to manage items waiting to be deposited (continue with step 3 below).
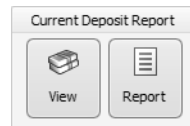
   b. Click the *Report* button to print a list of items waiting to be deposited.

3. After clicking *View*, each category of *Items for Deposit* will be displayed like "Pmt by Check", "Pmt by Cash", etc.

   a. Click the plus sign (+) to expand the list showing detail of a category like "Pmt by Check".

   b. Place a check mark next to each item that will be included in your deposit, then repeat for other categories like "Pmt by Cash".

   > Note: The upper total box (shown in red at this point) should equal the amount of your deposit.

4. Under *Deposit Accounts* select the *Bank Account(s)* to which these funds will be deposited and enter the *Amount* to be deposited to each.

   > Note: The upper and lower total boxes should now match each other and appear in green.

5. Choose a *Post Date* (the date the deposit is made at the bank).

6. Enter a *Comment* if needed (optional).

7. Click *Close Report*.

   > Hint: A deposit may be re-opened as long as it has not yet been reconciled in the Expenses & Ledger module. See article KB0151 at ProcareSupport.com.

View, Change or Print a Deposit Report
From the main screen of Family Data & Accounting:

If you entered year-to-date payments (page 58), as part of the Beginning Balances for each family, your first Deposit Report should include only those payments.

Cash and checks sitting in your cash drawer (which have not yet been deposited) are part of your "Undeposited Payments" asset account. Once you close the deposit those funds are moved to your Bank Account asset like "My Checking Account".

1. Click *Functions > Family Accounting > Deposit Report*.

2. A list of Deposit Reports will be displayed.

3. To print a closed deposit, click once on the deposit to select it and then (under the *Closed Deposit Report* section at the bottom) click the *Report* button.
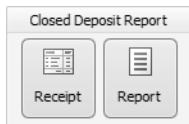
    You may also use the *Receipt* button to attach a bank receipt (in .pdf format) to a deposit report. Search ProcareSupport.com for article KB0219.

4. To view or change a report:

    a. Dbl-click the line you wish to view (or change).

    b. You'll see all items that were part of that deposit (see sidebar). If the Amount is unlocked you may make changes as needed then click *Close Report* to save your changes.

Family Accounting Reports

Family Accounting Reports work the same as Family Data Reports. See page 48 for the basics. To learn more about particular reports, see article KB0206 at ProcareSupport.com.

Report Categories

There are a variety of report categories such as Account Activity, Account Aging, Billing Box, etc. The most commonly used reports are:

*   **For Families** - Under the *Account Statement* category the *Customer Statement* report is typically given to each family at the end of a week or month while the *Account Charge / Credit Summary* is often used as their end of year summary for tax purposes (see sidebar).

    Hint: You may add a logo to statements (see sidebar page 9).

*   **For Your Child Care Business** - The *Account Balance Summary* reports are used to track how much is owed by each family while the *Total Charge / Credit Summary* reports give you revenue totals by category such as "Tuition - Infants".

Email Statements

Learn how to email statements to families through Procare. See article KB0237 at ProcareSupport.com.

Export to QuickBooks®

The optional QuickBooks Link lets you transfer financial data entered in Procare to QuickBooks® as a journal entry. Search ProcareSupport.com for article KB0405.
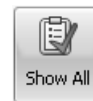
Use *Show All* to see other categories like "Pmt by Cash", etc. that were not originally included on the closed deposit report.

Combined Reports: If you have multiple locations (hosted in a single database) you may print certain types of combined or "corporate" reports that include information from all locations. See article KB0207 at ProcareSupport.com.

End of Year: For answers to common end-of-year questions, visit ProcareSupport.com.

Getting Started with

Tuition Express

Tuition Express streamlines the processing of child care related payments and supports a variety of payment methods including: individual point-of-sale payments, payments at a check-in computer, mobile/online payments, and recurring drafts from credit cards or bank accounts. Parent fees are deposited to your center's bank account the next business day. Both administrators and parents love the convenience!

Before Using Tuition Express

You are REQUIRED to review the *Tuition Express Implementation Guide* for instructions on installing and using Tuition Express in a PCI-DSS compliant manner. Failure to follow these guidelines will result in noncompliance.

To download the Implementation Guide, visit ProcareSupport.com and search for article KB0212.

Personal Setup Call

The basic setup for using Tuition Express will be done during your *First Time Setup Call* with a Tuition Express representative. We'll call you within a few days of receiving your Tuition Express packet. You may contact Tuition Express at: **1 (888) 419-5033**.

If you prefer, you may manually configure the information under "First Time Setup" (page 73).

Tuition Express Overview

Most Procare users make Tuition Express their preferred payment processing method—and for many centers, electronic payments are now mandatory. Imagine having all of your families pay on time.

Choosing Payment Methods

Point-of-Sale Payments (POS)

POS payments (page 76) are the quickest way to get started as they require no setup for families ahead of time. It's a super-convenient way to process individual card payments at the front desk or let families pay at a check-in computer or payment station.

Online Payments

Parents may also make online payments through MyProcare (for Cloud customers - pages 98 and 104).

Recurring (Batch) Payments

Families must be set up in advance for recurring payments.

- Family Setup: Done whenever new families sign up or a change is made (page 77).

- Process Recurring Payments: Done each week, month or whenever payments are due (page 79).

First Time Setup

Start by configuring overall settings such as your Tuition Express Account Number, payment descriptions and security settings within Procare. For assistance call: **1 (888) 419-5033**.

⚠️ You'll need your *Tuition Express Account Number* (sent in a separate "Welcome" letter) to activate Tuition Express.

Configure Tuition Express 🛡️ (System Supervisor required)

Download the Tuition Express Assistant to configure your overall settings.

1. From the *Procare Home* screen go to *Utilities > Download Support File.*

2. Enter a password of TE01 and click *Download*.

Download Procare Support File ❓ ✖️

Use this form to download a Procare Support file with the help of Procare Technical Support at 1-800-964-1729.

Password: TE01   🌐 Download   ↗️ Exit

3. At the *Tuition Express Configuration Assistant* screen (see image next page):

   a. Choose the *School* location for this Tuition Express Account (top left). If you have more than one location, you'll choose these settings separately for each of them.

   b. Enter the *TE Account Number* for this school (see sidebar).

   c. Check the appropriate boxes if you:

      - Accept credit cards

      - Accept individual point-of-sale payments

      - Wish to *Allow Batch Comments*. For non-Cloud customers.

      - Wish to *Allow Processing Date Changes.* This feature lets you select a processing date up to 14 days in the future and is helpful if you need to submit a batch ahead of time. The date is selected when you submit a batch.

      - Want to *Automatically Sync Account Balances* (for non-Cloud customers. See: FAQ249 at ProcareSupport.com).

Timeline: Learn when each step of the financial processing occurs. Search ProcareSupport.com for article KB0213.

If you have more than one location using Tuition Express, each will have its own *TE Account Number*.

Tuition Express Configuration Assistant

School
[S1] Little Red Schoolhouse #1

TE Acct. Number
3235-0000-573

Tuition Express

Preferences
☑ Accept Credit Cards
  ☑ Accept POS

Settings
☐ Allow Batch Comment
☑ Allow Processing Date Change
☐ Automatically Sync Account Balances

TE01 Version: 1.0.0.8

Charge / Credit Descriptions

		Amount
ACH Payment	Pmt Tuition Express: ACH Batch	
ACH Payment Return	Declined ACH Payment	
ACH Return Fee	ACH Return Fee	25.00
Credit Card Batch Payment	Pmt Tuition Express: CC Batch	
Credit Card Batch Payment Decline	Declined CC Payment	
Credit Card Batch Decline Fee	CC Batch Decline Fee	25.00
Credit Card Batch Refund	Credit Card Refund	
Credit Card POS Payment	Pmt Tuition Express: CC POS	
Credit Card POS Refund	POS Refund	
Batch Bank Account For Deposit Report	1000.00 Primary Checking Account	
Minimum Transaction Amount	10.00	

Install Enrollment Forms

✓ Update   Exit

Procare Version: 10.3.18144

d. Select the *Charge/Credit Descriptions* you wish to use for each item. If you have not previously made these choices, the default descriptions (recommended) are pre-entered for you.

Note: If the item says CREATE NEW DESCRIPTION, that means it does not exist and will be created for you (recommended); however, you may choose your own description from the list.

CREATE - NEW - DESCRIPTION

e. Choose the *Bank Account* for Tuition Express deposits (used for Deposit Reports).

Batch Bank Account For Deposit Report   1000.00 Primary Checking Account
Minimum Transaction Amount   10.00

f. Enter the *Minimum Transaction Amount* you want to collect through Tuition Express. If a family's balance is below this amount, the balance will not be processed.

g. Optional: Click *Install Enrollment Forms* (bottom left), choose the forms
[Install Enrollment Forms]
you'll use and click *Install*. These forms will be available in Letter Merge (page 44) to send to families.

Hint: Install the forms just once, even for multiple locations.

h. At the *Tuition Express Configuration Assistant* screen, click *Update* (bottom right). If you have additional locations using Tuition Express, repeat step 3 to set them up. When finished, click *Exit*.

Security - Group Limits

Block *User Groups* that are not allowed to use Tuition Express. You must log on as a *System Supervisor* to perform this task.

1. From the *Procare Home* screen go to *Configuration > System > Locations & Users > User Groups & Limits.*

2. Click once on a *Group Name* to select it.

3. Click the *Group Limits* button.

4. Tuition Express Limits are located under

   20: Family Data & Accounting >

   20: Family Accounting Functions >

   60: Tuition Express Functions
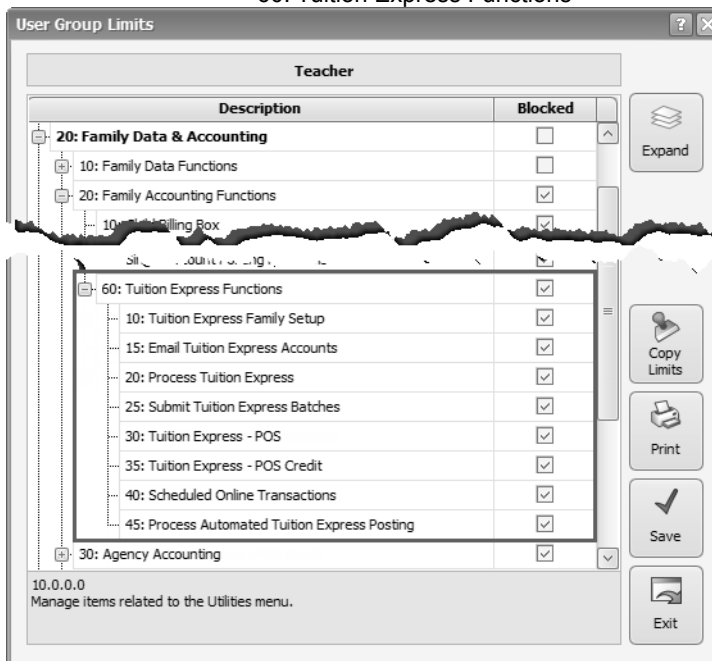
5. Place a check next to the entire category of *Tuition Express Functions* or an individual item, like *25: Submit Tuition Express Batches,* to block persons in that Group from that task.

6. Click *Save > Exit* to return to the *User Groups* screen.

7. Verify limits on other groups as needed, then click *Exit* again.

Pay at Check-In:
Let families pay at a check-in computer or payment station. See article KB0252 at ProcareSupport.com.

Point-of-Sale Payments (POS)

The POS feature lets you process individual card payments from anyone at any time. No prior family setup is required. Payments may be accepted at the front desk (described below) or families may also pay at check-in (see sidebar) or online at MyProcare (pages 98 and 104).

Process a POS Payment (at the front desk)

Before You Begin

• Card Reader: Make sure the card reader (card swipe device) is connected to your computer. A green light should be displayed indicating the card reader is ready.

• Receipts: You'll want to turn receipt printing ON to print a duplicate receipt with a merchant copy for you to keep (and the customer to sign) and a copy for the customer as well (page 57).

How to Process a POS Payment
Begin at the main screen of Family Data & Accounting:

1. Look up the family (page 41) and click the *Ledger* icon on the account toolbar.
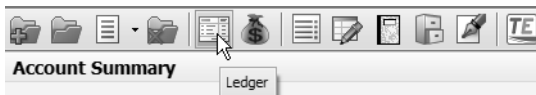
2. Click the *TE POS* button (bottom center).

Manual Entry: If needed you may manually enter credit card information. Yellow fields are required, white are optional. Enter as much information as possible for the best rate.

3. Click Swipe Card (top left) and run the card through the reader.

4. After scanning a card, the Card Holder Information appears including the amount due (for manual entry see sidebar).

   a. Edit the *Amount* if needed.

   b. The *Payment Description* for *POS* transactions will default to the value selected when you first configured Tuition Express (page 73). You may make a one-time change if needed.

c.   Click *Process*.

Receipts print based on your settings (page 57).

The payment will automatically be recorded on the Ledger Card with the Point-of-Sale Transaction Number.

POS Payments & Deposit Reports

At the end of each day—in order to have POS payments auto-close in their own Deposit Reports—you must go to either the *Process Tuition Express* screen (page 79) or the *Process Automated Online Posting* screen (image below). When you do so, deposits are closed for POS payments made the previous day. See articles KB0215 and KB0216 at ProcareSupport.com.
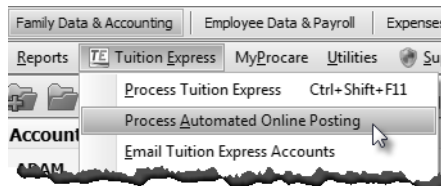
Credit Card Refunds

You may issue a refund to anyone who has paid by credit card within the past 180 days. The refund must be issued to the same card used to make the payment. This applies to individual point-of-sale (POS) payments, payments at check-in, online payments, and recurring credit card (batch) payments. ACH payments cannot be refunded. See article KB0261 at ProcareSupport.com.

NSFs and Declines: Learn how to process ACH non-sufficient funds and declined credit cards. Search for article KB0346 at ProcareSupport.com.

Recurring (Batch) Payments

Set Up a Family for Recurring Payments

1.   Look up the family (page 41) at the main screen of Family Data & Accounting.

2.   On the account toolbar click the *Tuition Express* icon.

Get details on how to set up each type of account (card, checking, savings). Search ProcareSupport.com for article KB0126.

3.   If you want to automatically collect recurring payments from this family select *Credit Card, Checking* or *Savings* and enter the card holder or bank account information (see sidebar).

IMPORTANT!
Do not select *Website Registration* for recurring payments. This is only used in certain cases for non-Cloud customers. See article KB0248 at ProcareSupport.com.

Hint: Change the *Start Date* if you've made arrangements with the family not to begin collecting funds with Tuition Express until a particular date.

Hint: For checking accounts the routing number (9 digits) and account number (# of digits varies) are typically as shown on the sample check below.

Routing Number   Account Number   Check Number

4. The *Maximum Amount* should typically be left at the default setting. This is the most that may be transferred from this family's account in a single transaction, although Tuition Express will never collect more than the family's current balance due.

5. Enter the *Start Date* on which transactions may begin, typically today's date (see sidebar).

6. In the lower left, confirm that *Disable batch processing* is unchecked. In most cases you may ignore the *Disable online processing* checkbox (just leave it checked), as it is only used in certain cases for non-Cloud customers.

☐ Disable batch processing for this account
☑ Disable online processing for this account

7. Enter any *Comments* regarding this family's account. The comment is for your purposes only. It is not used in the transaction process. At this point the approval status for the family will say *New Record – Not Transmitted* (upper part of screen).

> Connected
>
> ADAM
>
> New Record -- Not Transmitted

8. Click *Save & Exit*. The information is automatically sent to Tuition Express for approval. If you return to the family's Tuition Express screen, it should now say *Approved*. The approval process for parents is immediate.

> Connected
>
> ADAM
>
> Approved

Hint: You may send email specifically to families set up for batch (recurring) payments. See article KB0513 at ProcareSupport.com.

Process Recurring Payments

Before You Begin

•   Run Automated Billing (page 62), so each family has a balance due.

•   If you wish to process just certain families (such as weekly versus monthly payers), set up Account Tracking (page 23) and assign tracking to families (page 39) ahead of time.

Recurring Payments

Each batch must be received by 1:00 pm Pacific to begin processing that day.

Tuition Express Utilities @ Supervisor Utilit
    Process Tuition Express   Ctrl+Shift+F11
    Email Tuition Express Accounts
    Scheduled Online Transactions
    Force Online Balance Sync
    Learn Tuition Express
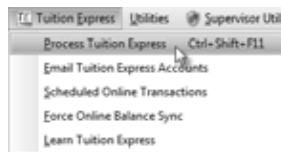
1. From the main screen of Family Data & Accounting go to the *Tuition Express* menu > *Process Tuition Express*.

> Note: If you accept online payments from families and there are any online batches waiting, you'll be alerted to post the online batches first. See article KB0248 at ProcareSupport.com.

2. At the *Ready* screen there are several optional choices:

    a. You may make a one-time change, if needed, to the *ACH* or *Credit Card Batch* descriptions. They will default to the items selected when you first set up Tuition Express (page 73).

b.   Optional: Click the *Client List* (lower left) for a summary of each payer's *Start Date, Max Amount* and whether *Batch Payments* or *Online Payments* are allowed.
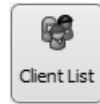
c.   You may select accounts to process based on their assigned Account Tracking. Skip this step if you want to process everyone that has a balance due.

   c1. Click *Filter Accounts* (bottom center).

   c2. Choose the tracking item(s) to include. For example, you may wish to include only families that are billed weekly.

Tracking - Account Filter

☑	Billing Cycle - Weekly
☐	Billing Cycle - Monthly
☐	Marketing - Friend / Referral
☐	Marital Status - Divorced

All	None	Invert
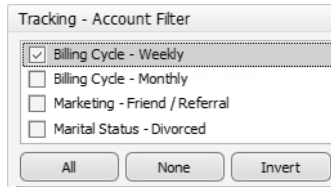
   Note: Although all accounts will appear on the processing screen, you'll only be able to process those in the selected group(s).

3.   Once you have made any optional selections, click *Next*.

4.   Select accounts to process:

a.   Select families to process for ACH payments (if any). Edit the amount to *Collect* if needed (may be lowered, not raised). Select all accounts or click just to the right of the check box to sort according to which families are selected and which are not.

ACH Batch Items

Account	Payer	Max	Balance	Collect	☑
▶ BRAD	Brady, Mike	1500.00	195.00	195.00	☑
COMB	Combs, Charla	1500.00	140.00	140.00	☑

   Hint: If no families are shown it may mean they have not yet been approved, no family has a balance due, or that today is BEFORE their Tuition Express Start Date.

◁ Back	🖨 Print	☑ Use batch comment Dates of service: March 1-15.	▷ Next	↪ Exit

b.   Click *Next*.

c.   Select persons paying by credit card (if any) and click *Next* again (see sidebar hint).

   Note: If you have only credit cards or only ACH payments, you'll have just one screen to select families.

5.   Review and Submit Batch:

a.   Review the *Batch Summary* (top of screen). If changes are needed click the *Back* button.

Type

Hint: Click a heading, like *Type*, to sort that column. This can be useful if you want to process some types of credit cards separately.

ACH Batch Summary		Credit Card Batch Summary	
Number of transactions:	2	Number of transactions:	2
Amount of batch:	335.00	Amount of batch:	807.50

b.   Choose a *Requested Processing Date* (bottom center) up to 14 days in the future (to enable this feature see page 73).

c.   Click *Submit*.

d.   A message will appear on screen when the batches have been successfully transmitted. Click *Exit*.

> Note 1: At this point, payments have been posted to each account Ledger Card with the "Batch Confirmation Number" in the *Comment* box. ACH transactions (from checking & savings) will have a separate batch number from payments made by credit card.

> Note 2: The current balance for each family has also been updated at TuitionExpress.com.

Email Receipts

•   Batch Received: A confirmation email will be sent to you shortly after Tuition Express receives your transmission. Each batch must be received by 1:00 PM Pacific Time to begin processing the same day.

•   Bank Deposit: Within 2 banking days a second email will be sent confirming the deposit(s) to your account and showing transaction fees that will be deducted from your account.

Change or Cancel a Batch of Payments

After a batch of payments has been submitted, you may make changes to individual items or cancel the batch completely. **Changes may be made until 12:45 pm Pacific Time** on the day the batch is scheduled to be processed. See article KB0233 at ProcareSupport.com.

Recurring Payments & Deposit Reports

Recurring Tuition Express payments are automatically closed in their own separate Deposit Reports (page 68), one for ACH transactions and another for Credit Cards. See above for how to change or cancel a batch.

TuitionExpress.com for Centers

TuitionExpress.com is the most convenient way for centers to view account information and run reports.

Registration & Log In for Centers

You must register (once) to establish a username and password you'll use each time you log in to TuitionExpress.com.

1. Go to TuitionExpress.com.

2. If you have previously registered enter your *Username* and *Password* then click Secure *Login*.

3. If you have not yet registered, click the *Register* link, then:

Hint: The ID number for your center is the same as your Tuition Express Account Number. See *Configure Tuition Express* on page 73.

   a. Enter your Tuition Express ID number (see sidebar).

   b. Enter your *Registration Code*. This is the last 4 digits of your bank account number (the account you provided to Tuition Express for deposits).

   c. Select a *Username* and *Password*. Then *Confirm* the *Password* and click *Register*. If you forget either one you can always re-register later.

   d. Follow the on screen instructions to complete the process.

Tuition Express Reports

For center financial information:

* Log into TuitionExpress.com (described above) for monthly statements, bank account activity reports, and more.

* You may also print Deposit Reports from within Procare (page 68).

Getting Started with

Attendance Tracker

Attendance Tracker lets you record time and attendance of children and/or staff (with employee data) and charge attendance based fees like an hourly rate, half/full day, overtime, extra days and late pickups. You can even import staff hours worked directly to paychecks using the Payroll module.

In addition to tracking clock in times, the Attendance Tracker may be used to send messages to parents and authorized pickups when they check children in/out, and display information like recent accounting history, immunizations due, etc.

Time Cards & Check-In Methods

To understand Attendance Tracker you'll need to know the basics about how Child Time Cards work and the various methods for checking children in and out.

- Time Cards: Manual entries can be made on the time card whenever needed (see below).

- Batch Attendance: Check groups of children in or out (page 85).

- Authorized Pickups: Assign people allowed to pick up each child, then give them a registration number they'll use to register at the check-in computer (page 87).

- Family Check-In: Learn how to set *Check-In Options* (page 88) and check children in from a computer terminal (page 92).

- Receptionist Check-In: Front desk personnel may check children in on behalf of an authorized pickup person. Use *instead* of Family Check-In, not in a mix and match fashion. See article KB0163 at ProcareSupport.com.

Child Time Cards

Use the Time Card to view a child's clock in times or make manual entries and corrections (see page 117 for Employee Time Cards).

1. Look up the family (page 41) and click once on the name of the child to select them.

2. Click the Time Card icon (clock) on the child's toolbar.

Hint: Quickly repeat information. Click on a new blank line then click *Copy Day* or *Copy Week*.

Use the *Audit* button to view a history of all changes on the Time Card.

3. To enter a new line, the previous line must have both a *Time In* and *Out*:

    a. Click the bottom (blank) line and select a *Classroom*.

    b. Confirm the *Date In* and *Time In,* which default to the current date and time. Make changes as needed.

    c. (Optional) If you're ready to add check "out" information, click or tab to the *Date Out* and *Time Out* (which default to the expected date and current time). Make changes as needed.

    d. Click *Save*.

4. If the line just entered has both a *Time In* and *Out* you may continue adding additional lines clicking *Save* after each one.

5. When finished click *Exit*.

> Hint: Hold your mouse over the far left side of a line to see the total hours for that line.

Show Rounding / Show Actual

Click *Show Rounding* to see in / out times rounded, then click *Show Actual* to toggle back to the exact time. Rounding may be set by a System Supervisor at the Regions & Schools *Options* screen. Search ProcareSupport.com for article KB0030.

Batch Attendance Features

There are two types of batch attendance features where you can check in a group of children all at once.

• Use *Batch Check-In / Out* (see below) to check children in or out (not both), or transfer them to a particular classroom.

• Use *Batch Post Time Card* (page 86) to check children both in and out for the day.

Using Batch Check In / Out

You'll use Child Tracking Categories (page 23) to select groups of children for check in or out - such as those who arrive or depart on a particular bus.

End of Day: You'll also use this feature at the end of each day to check out anyone who forgot to check out.

---

1. At the main screen of Family Data & Accounting click *Functions > Attendance Tracking > Batch Check In / Out*.

2. Choose what you want to do (check in, out, or transfer children) from the Batch Type list (upper left).

3. Select the *Date* and *Time*.

4. Place a check next to the Child Tracking Items you wish to include, such as "Bus Run - Jefferson Elementary". If you select more than one item, children with any of the selected items will be included (see sidebar "end of day" hint).

> Note: When *Transferring* children you'll select the classroom(s) they are currently in instead of Tracking Items.

End of Day Hint: To include all eligible children regardless of their Tracking don't select any *Tracking Items* just click *Refresh List*.

5. When checking IN only, choose whether children should be checked into their *Scheduled Classroom* (for this day and time) or their more generic *Primary Classroom*, for example if you're not using the Child's Schedule feature (page 36).

> Note: When *Transferring* children select the classroom they will be transferred to.

6. Click *Refresh List* to display all children who meet your criteria and are eligible for this procedure.

> To be eligible a child must have a current enrollment status of *Enrolled* (page 35) and have the appropriate check-in / out state on their Time Card. For example when checking kids in only children who are currently checked OUT would be eligible.

Children without a classroom cannot be selected. Choose a classroom for them and then place a check next to their name.

7. With the children's names displayed (right side), select the children to include. Place a check in the column header to select them all (see sidebar).

8. Click *Process,* then *Exit*.

Batch Post Time Card

Use this procedure to check children both IN and OUT for the day. This is helpful for things like field trips or when you are manually entering hours based on children's schedules or a sign in sheet.

1. At the main screen of Family Data & Accounting click *Functions > Attendance Tracking > Batch Post Time Card*.

2. Include children *Enrolled As Of* the date you specify.

3. Choose whether to use the child's *Primary Classroom* or their class based on *Schedule*.

4. Choose to include *All Classrooms* or one particular class.

5. Select the *Date*, *Time In* and *Time Out*.

> Note: Time In and Out will not be displayed when the option to base time on schedules is selected. In that case the scheduled times will be used automatically.

6. Click *Next* to display all children who meet your criteria and are eligible for this procedure (see sidebar).

7. Select the children to include. Place a check in the column header to select them all.

8. Make any necessary changes to the *Time In* and *Time Out* for individual children.

9. Click *Process*, then *Exit*.

Authorized Pickups

Assign people allowed to pick up each child, then give them a registration number they'll use to register at your check-in computer.

Assign Pickup People

1. Look up a family (page 41) and click once on a child (to select them) to whom you wish to assign pickup persons.

2. Click the *Information & Relationships* icon on the child toolbar.

3. Place a check in the *Pickup* box for each authorized person.

> Hint 1: Add more people to the list (page 33).

> Hint 2: View children this person is authorized to pick up (see sidebar).

4. Click *Save > Exit*.

5. Repeat for other children in the family.

Get a Registration Number

Each pickup person will be assigned a random number they'll use to register at the check-in computer in order to begin checking children in and out. This is a temporary number they will use just once. You may generate a registration number for one particular person (described below) or for everyone at once (see sidebar hint).

1. Look up a family (page 41) and select any child to whom this pickup person is assigned.

To be eligible for *Batch Post Time Card* a child must be enrolled (page 35) as of the specified date and be assigned to the selected classroom as their *Primary* or *Scheduled* class.

Dbl-click the pickup person's name, then click the *Pickup* button to see a list of children this person is authorized to pick up. Use the up/dn arrows to change the order, for example to list their own children before children of friends or neighbors.

Hint: Create Registration Numbers for everyone at once. From the main screen of Family Data go to *Functions > Attendance Tracker > Temporary Registration*.

Then, print a report showing the numbers. Go to *Reports > Standard Reports > Attendance Tracker > Registration > Temporary Registration*.

Deny Entry / Prevent Check In: You may deny entry to certain children so none of their authorized pickup people are able to check them in or out. See article KB0503 at ProcareSupport.com.

2. Click the *Information & Relationships* icon on the child toolbar.

3. Dbl-click the photo or name of the pickup person to access their *Person Information* screen.

4. Click the *New Register* button to generate a temporary Registration Number for this person.

> Note: The Registration Number is valid for 7 days. After that, just repeat these steps to generate a new one.

5. Give this Registration Number to the pickup person. Have them use their number to register at the check-in computer (page 92).

Check-In Screen Options

If you are using a check-in computer for families and/or staff you'll need to set certain options to control how the check-in process works and what information people may view.

1. Use the *Procare Check-In* shortcut on your desktop to open the check-in screen.

2. Dbl-click (or dbl-tap) anywhere in the border area around the logo (or press *Esc* on your keyboard) and then select *Options*.

To exit the check-in screen, dbl-click (or dbl-tap) anywhere in the border area to display the *Exit* button (see image to right).
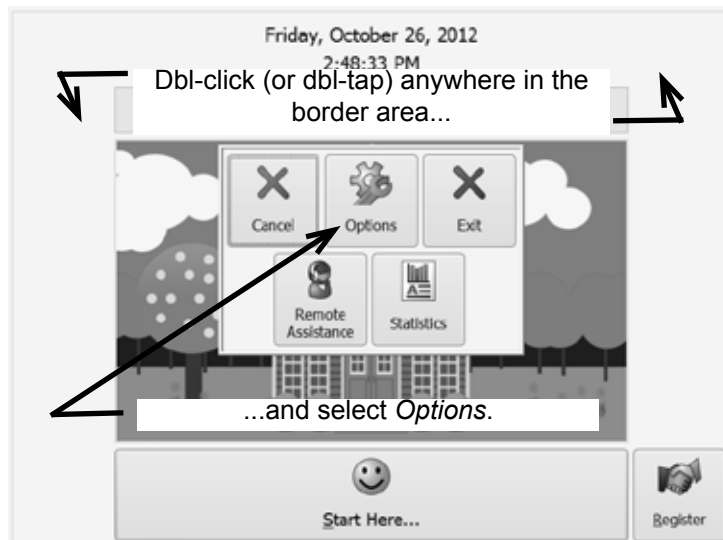
Required Check-In Settings

School Info
At the top of the screen, under *School Info*, select the appropriate check-in location.

```
School Info
Little Red Schoolhouse #1
Little Red Schoolhouse #1
Little Red Schoolhouse #2
```

Check-In Type
Select the *Check-In Type* you'll use. This determines the type of identification needed to check in (see sidebar image).

```
Checkin Type
○ Person ID
⦿ Fingerprint
○ Cardswipe
☐ Allow Bypass
☐ Require Password
```

Check-In Type: Select the method people will use to check in & out.

    a.   Person ID - People will choose a numeric Person ID and a separate numeric password.

    b.   Fingerprint - People will use their fingerprint (requires a bio-metric ID pad) and choose a numeric password (optional).

    c.   Cardswipe - People will swipe their card (requires a card reader) and choose a numeric password (optional). Any magnetic stripe card may be used such as a credit card, grocery club card, etc., or you may purchase cards from a third-party vendor (see article KB0415 at ProcareSupport.com).

    d.   Allow Bypass - If Fingerprint or Cardswipe are selected the bypass option allows people to choose not to use those methods of identification and instead choose a *Personal ID* number (and separate numeric password).

    e.   Require Password - If Fingerprint or Cardswipe are selected, you may require people to use a password in addition to the fingerprint or magnetic card by checking this box.

Hide Mouse Pointer
If you're using a touch monitor, check the option to *Hide Mouse Pointer*.

```
☑ Hide Mouse Pointer
☑ Allow Payments
```

Allow Payments
If you accept credit cards through Tuition Express and want families to be able to swipe their card to pay at check-in (or make this a payment kiosk), be sure to check the *Allow Payments* box.

Optional Check-In Settings

Password
Select the *Password* button (lower left) and enter a password. Anyone needing access to this *Options* screen, or to *Exit* the Check-In program, would need to know the password.

Description
Select the *Description* button (lower left) and give this computer a name, like "Front Door", "Side Entry", etc. This is helpful if you have multiple check-in computers.

Sound
Choose the *Sound* button and select a sound file (.wav) to play when a person successfully checks in or out. You may also select a sound to play if entry is denied to a person because their child appears on the *Deny Entry* list (see article KB0503 at ProcareSupport.com). A button with a red slash indicates no sound has been selected for either case.
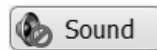
Sound selected = NO   Sound selected = YES
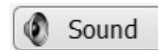
School Picture (Logo)
Select an image you'd like to have displayed at the main check-in screen (use *Preview* to see it) or click *Add* and browse to your own image, like a logo for your school.

> Note: For best results the image should be 554 pixels wide by 327 pixels high or a similar proportion.

Language
Choose the *Language*(s) you want to have available for check-in. If you select more than one, a button will appear at the main check-in screen so people will have a choice.

Skin / Color Scheme
You may change the appearance of the check-in screen by selecting a "skin" or color scheme (lower left).

Screen Time Out
If a person walks away from the screen without completing the check-in process it will return to the opening screen after the specified time (lower left).

Family Data Options
Select the *Family Data* button to choose information to display when people check children in/out.

a. Display Finish Screen - Choose how long to display the final screen that lets people know they completed the check-in procedure successfully.

b. Display Accounting - Choose whether to display the account balance only or also include recent charges, payments and credits to *All Payers*, or the *Primary Payer* only.

c. Account Balance - If the balance or accounting is displayed, choose to display them *As of Today* or to *Include All Entries* (such as future entries dated for next week or next month).

d. Automatically Check Children In / Out - This feature assumes all children in the family are to be checked in or out at once. Since siblings may attend at different times, or on different days, it's generally best to leave this unchecked.

e. Require Signature - If you are using a signature capture device, you must check the *Require Signature* box. At the end of the check-in process the person will be required to sign their name. Please note that although the signature is recorded, it is not used for identification purposes.

f. Other Buttons - Choose to display child *Schedules, Immunizations Due*, and/or *Messages*. Search ProcareSupport.com for article KB0121 on how to send check-in messages.

Employee Data Options

Select the *Employee Data* button for settings related to staff check-in. Choose whether to display the employee *Time Card*, *Schedule, Immunizations* and *Messages*.
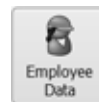
Hardware Options

Select the *Hardware* button for settings related to the fingerprint reader, ticket / receipt printer and door controller. See articles KB0127 (Check-In Options) and KB0345 (Network Door Controller) at ProcareSupport.com.

Forgot Your Password?
If a person forgets their password you may give them a new temporary *Registration Number* (for pickup people see page 87, for employees see page 119). Then they may *Register to Check In* again.

Family Check-In & Employee Check-In

You may want to help authorized pickup people (and new employees) when they first register and check in to make sure they are comfortable with the process.

Register to Check In

Before checking in the very first time each pickup person (and employee) will need to register at the check-in computer using the temporary Registration Number you gave them (for pickup people see page 87, for employees see page 119).

1. At the check-in computer select the *Register* button and follow the on screen prompts.

2. Depending on which *Options* are selected (page 88) the pickup person (or employee) will be asked to register one of the following items to identify themselves. Search ProcareSupport. com for article KB0238 for related information.

   a. A personal ID number of their choosing.

      Note: The number cannot be sequential (like 1234 or 4567) or repetitive (like 1111 or 2222).

   b. Their fingerprint.

   c. A magnetic swipe card (credit card, grocery club card, etc.).

3. Then, they may need to select a 4 to 8 digit password (see sidebar).

      Note: Again, this cannot be sequential (like 1234 or 4567) or repetitive (like 1111 or 2222).

How to Check In

Check in and out using a computer check-in station.

Eliminate Passwords:
When using fingerprints or magnetic cards, you may choose not to require a password for checking in (page 89).

Before you begin
In order to check a **child** in they must:

   a. be enrolled (page 35) as of the current date.

   b. be assigned to a Primary Classroom (page 33).

   c. have at least one pickup person assigned (page 87).

   d. and that person must have registered at the check-in screen (see above).

In order to check an **employee** in:

    a.   Required: They must be currently employed (page 113).

    b.   Required: They must be assigned to a *Primary School* location (page 112).

    c.   Required: They must have registered at the check-in screen (page 92).

    d.   Recommended: Assign a *Primary Work Area* to be used as their default when checking in (page 112).

    e.   Recommended: Assign a *Pay Code* (page 116), also used as their default when checking in.

    f.   Optional: Set up *Employee Schedules* (page 114) so the default *Work Area* and *Pay Code* are based on where a person is scheduled at that time of day.

> Note: You MUST set up schedules when using the "Restrict to Schedule" feature. See article KB0478 at ProcareSupport.com.

Checking In / Out

1.   At the check-in screen select *Start Here*.

2.   Enter the identification requested. Depending on which *Options* are selected (page 88) one of the following must be used.

    a.   The personal ID number chosen when registering.

    b.   The fingerprint used to register.
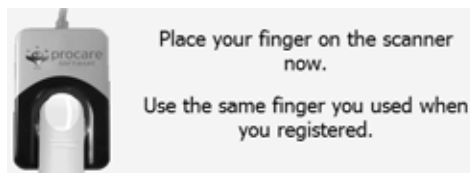
    c.   The magnetic swipe card used to register.

Check-In Messages: Learn how to send messages. Search ProcareSupport. com for article KB0121.

3. If required, enter the password chosen during registration.

4. Select children to check in/out so the button says they "will be checked in". View items that may be available, like Accounting, Schedules, Immunizations, or Messages (see sidebar).
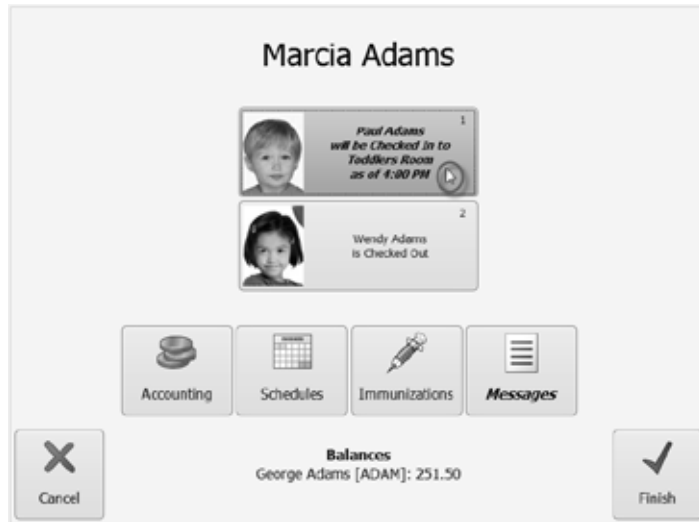
Note 1: Messages MUST be viewed before the check-in process can be finished.

Note 2: If you're using the *Option* to "Automatically check children in" (page 90), you would select any children you did **not** want to check in or out.

See who checks in and out as it happens. Download the free *Check-In Monitor* from procaresoftware.com/extras.

5. Choose *Finish* (image above - bottom right). A confirmation screen will be displayed and the check-in / out time will now appear on the child's Time Card (page 84).

Attendance Reports

Attendance Reports work the same as Family Data Reports. See page 48 for the basics. To learn more about particular reports, search ProcareSupport.com for article KB0210.

Keyless Entry System

The optional Keyless Entry provides secure access to your child care facility by allowing only authorized staff and families to enter through an exterior door. The Keyless Entry is intended for building access only and operates separately from the Attendance Tracker module. Search ProcareSupport.com for article KB0176.

Getting Started with

MyProcare

MyProcare is an online portal available to centers
that host their data in the Procare Cloud. Through MyProcare, new
families may register online and existing families have access to
information, such as child schedules, time cards, immunizations, log
sheets, financial history and their balance due, as well as the ability
to make mobile payments, select schedules, and re-register their
children.

MyProcare Overview

MyProcare.com is a parent portal available exclusively to Procare Cloud customers, that serves two primary purposes:

1. New families may register online or be placed on a wait list. See "Best Practices" below.

2. Current families have access to information, such as child schedules, time cards, immunizations, log sheets, financial history and their balance due, as well as being able to make mobile payments (for centers with Tuition Express), and re-register their children.

> For up-to-date information, search for KB0610 at Procare-Support.com.

Best Practices

For brand-new families:

• We recommend using the New Family Registration feature to gather minimal information from families. When using the Question Manager (page 99), ask as few questions as possible—only what you need to know to choose whether to import them into Procare.

• Once imported, families will be able to go through re-registration to answer a more complete set of questions you create and pay any registration fees (for centers using Tuition Express).

For current families:

• Use the features described here to give families access to information, print reports, make payments (for centers using Tuition Express), and schedule their children.

• Current families may also re-register their children.

Set Up MyProcare

Run the Setup Wizard

As a System Supervisor, you'll use a wizard to turn on MyProcare and help you choose overall settings.

3. From the main screen of Family Data & Accounting, go to *My-Procare > Setup Wizard.*

4. Follow the on-screen instructions or search ProcareSupport. com for article KB0610.
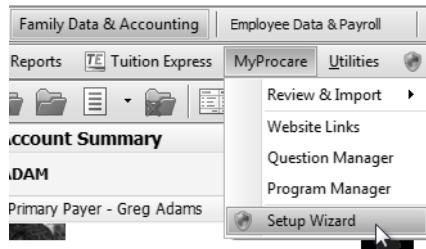
Family Scheduling: Let families choose schedules for their children at MyProcare.com. See article KB0615 at Procare-Support.com.

Create Questions for Families

You may create questions for new families to answer when they first register online, and separate questions for current families when they re-register their children. See "Best Practices", page 98.

1. From the main screen of Family Data & Accounting, go to *My-Procare > Question Manager.*

2. Choose to create questions for the account (the family as a whole) or questions that are answered separately for each child.

   a. New family questions: Click on the *Type* (New Account or New Child) to choose that set of questions, then click *Edit*.

   b. Re-registration questions: Click the small arrow next to the *Add* button and choose *Add Re-Reg Account* question or *Add*

Re-Reg Child question. Then, click on the *Type* (Re-reg Account or Re-reg Child) to choose that set of questions and click *Edit*.

Add	Edit	Delete

Add Re-Reg Account
Add Re-Reg Child
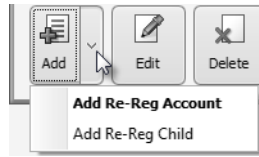
Hint: Use the *Nickname* to clearly identify different sets of questions. This is especially useful for re-registration if the questions for each set of programs are different.

Nickname	Type	Active
	New Account	☑
	New Child	☑
PreK and Younger Programs	Re-Reg Child	☑
School-Age Programs	Re-Reg Child	☑

Type the question you want parents to see as the *Tool Tip* for Tracking or User Defined Fields. If you leave the *Tool Tip Text* empty, the parent will see the Tracking Group Name (or Field Name) as the question.

Tool Tip Text
What allergies does this child have?
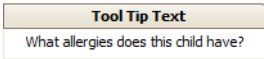
3. In the top left, choose to view *Tracking* items (to manage multiple choice questions) or *User Defined Fields* (to manage yes/no, text boxes, numbers, dates).

New Family - Child Questions

☐ ◉ Tracking   ☐ ○ User Defined

Possible Questions - Tracking
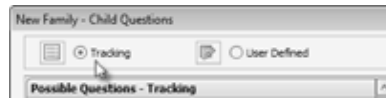
4. To create new or change existing questions use the *Edit Tracking* and *Edit User Defined* buttons (bottom left). Use the *Tool Tip Text* for the question you want parents to see (see sidebar).

Edit Tracking   Edit User Defined
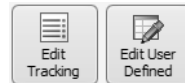
5. To add or remove items from your list of *Selected Questions* (right side) use the blue left and right arrows (center of screen).

School-Age Programs (Re-Registration - Child Questions)

☐ ◉ Tracking   ☐ ○ User Defined

Possible Questions - Tracking
☐ Does the child need transportation?
☐ Part-time, full-time, etc.
☐ Required forms for child.
☐ Extra activities.
☐ Which summer weeks
☐ MyProcare Child Tracking

Selected Questions	Required	Exposed
What allergies does this child have?	☑	✓
Is the child potty trained?	☐	✓

6. To change the order of *Selected Questions*, use the green up and down arrows (bottom center of screen).

7. The *Preview* button shows how questions appear to a parent.

MyProcare

8. When you're finished managing questions, click *Save > Exit*.

Create Programs for Re-registration

To allow families to re-register, you'll create programs they'll choose from for their children. For more details search ProcareSupport.com for article KB0528.

1. From the main screen of Family Data & Accounting go to *My-Procare > Program Manager.*

2. Choose *New* to add a program.

3. Fill out the *Program Details* (top half of screen), including which set of questions you'll want families to answer.

4. Create *Sessions* for the program (lower half of screen). There must be at least one session.

Hint: Add multiple sessions with different registration dates and session start and end dates by using the *Add Session* button.

Get a Link for Your Website

You'll need a link to MyProcare to place on your website for families to have access to register and/or view their information once their children are enrolled.

1. From the main screen of Family Data & Accounting go to *My-Procare > Website Links.*

2. Choose *Copy* to get a link for existing families or new family signups. The *All Schools* button generates a list of links (for new families) for all locations at once.

3. Add these links to your website or send them to your web person to have them update your site.

> Hint: You may also email the link to families as needed.

Download Email Templates for Families

You may download letter templates to introduce families to MyProcare which include a link and instructions to log in. The templates will appear in the *Letter Merge* feature (page 44) and may be emailed to all families (or a select group) at once.

1. From the main screen of Family Data & Accounting, go to *Utilities > Download Procare Support File*.

2. Enter a password of **MP01**.

3. Check the box for any of the introductory MyProcare letter(s) you may want to send out, and click *Install*.
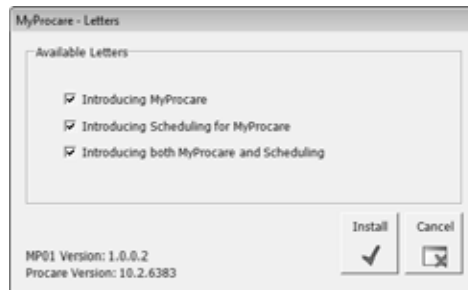
Using MyProcare.com

Parents will access MyProcare through a link on your website or sent through email (see "Download Email Templates" page 102).

Hint: Current families may go directly to MyProcare.com; new families will need the specific link for your center—if you have multiple centers, each has its own link (see "Get a Link for Your Website" page 102).

Log into MyProcare

Parents will register using their email address:

a. New families: Since the email for a new family will not yet be in Procare, they will receive a temporary code (sent to their email) to log in. No password is needed.

b. Existing families will use the email shown on their *Person Information* screen in Procare (see sidebar) and choose a password the first time they log in.

> Note: Each person must register with a different email address. If two parents share a single email, it can only be entered for one of them (in Procare) and they'll register only once, choosing a password they both need to know.

Email

my-email-address@gmail.com

To change or remove an email address, see *Edit a Person* (page 33).

Using MyProcare - New Family Registration

1. Once a new family has logged in, they'll follow the on-screen prompts to enter their information and submit it to your center for review.

2. The family will receive an email showing the information they entered and the center receives a copy of the email too. The family may print and sign the email and bring it to the center (at your request) or just keep it for their own records.

A current family is one that is already in Procare, which could happen two ways:
• They register online and you import them.
• They are manually entered into Procare.

Import New & Re-registering Families to Procare

Use the *Review & Import* tool to see new families who have registered online (and current families who have re-registered) and choose whether to import them to Procare. For details, see articles KB0610 (new families) and KB0528 (re-registration) at ProcareSupport.com.

To review and import families, go to *MyProcare > Review & Import >* and choose either *New Families* or *Re-registrations*.
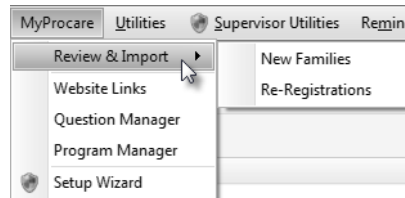
Mobile Payments:

The *Pay* button appears automatically to current families at centers using Tuition Express. Parents simply press PAY and choose their card. For details, contact Tuition Express at: **1 (888) 419-5033**.

Using MyProcare - Current Families

Once a current family (sidebar above) logs in, they'll be able to access information about their account and their children, pay tuition, print reports and update certain information.

You also have the option to let parents:

• Choose schedules (see article KB0615 at ProcareSupport.com).

• Re-register children (article KB0528).
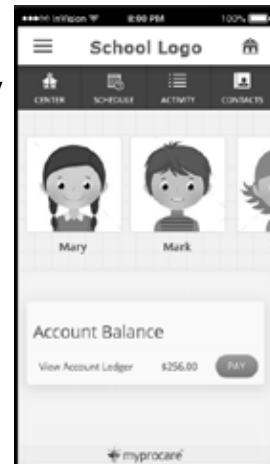
Choose to show individual log notes in MyProcare.

Let Parents View Log Sheets

When making a log entry for a family or child, you may choose to display that entry to parents.

1. Click the *Log Sheet* icon (looks like a lab book) on the child toolbar or account toolbar as appropriate.

2. Create a new log or edit an existing one (page 40).

3. At the *New* or *Edit* screen, place a check in the *Show in MyProcare* box (see sidebar image) to allow parents to see this log note online.

   Note: *Restricted* logs cannot be displayed in MyProcare.

Limit Parents

Choose what to allow parents to do, such as whether they can update certain information, view time cards, etc. These settings are chosen in the *Setup Wizard* (page 99) under *Current Families > General Settings > Parent Limits*.

MyProcare Reports

MyProcare Reports are useful for information like which parents are using the system and which have never used it. They are located under the Family Data section of reports (image below) and work the same as Family Data Reports. See page 48 for the basics.

From the main screen of Family Data & Accounting, go to *Reports > Standard Reports > Family Data > MyProcare*.
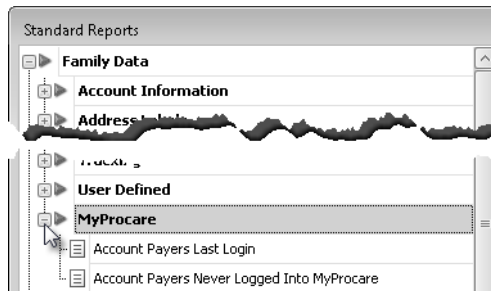
KidReports - Parent Engagement Apps

KidReports is an optional service to further enhance engagement with parents by providing electronic daily sheets, photos, videos and more. Teachers add activities through a tablet app, while parents have access through their phone or mobile device. Family information from Procare syncs with KidReports for a truly seamless solution. To learn more, search for "kidreports" at ProcareSoftware.com.

Getting Started with

Employee Data

Employee Data is the place to record all staff related infor-mation including hire dates, schedules, time cards, benefit hours and immunization records.

Configure Employee Data

Before entering staff information, you'll want to configure at least some of the overall "*Data Management*" settings that affect all employees, like departments and work areas. You may set up other items now or come back to them later.

Departments, Work Areas & Classrooms

If you haven't already done so you'll need to set up Departments, Work Areas and Classrooms (see page 18).

Pay Periods & Overtime 🛡 (System Supervisor required)

For time card records and payroll calculations you'll want to set up pay periods and indicate how overtime should be determined.

1. From the *Procare Home* screen go to *Configuration > System > Locations & Users > Regions & Schools*.

2. Dbl-click the name of the *Region* to *Set Options* for the Region.

3. Select the *Employee Data* section (left side).

   a. Under *Standard Options* (top right) choose the *Start Day of Pay Week*. This determines when a 40 hour work week begins.

   Note: This is not related to the pay period itself. While the day a pay period begins may vary the *Start Day of Pay Week* is always the same. For example overtime would always be calculated from Monday through Sunday, regardless of the pay period.

   b. Scroll down to the *Pay Period Information* section and choose whether you pay every week or every two weeks, etc. See sidebar for "Custom" settings.

   c. Select a *Start Date 1* and click *Save*. This is the date your first pay period began. If you pay weekly the start date is typically the first Monday of the year.

   Note: Click *Pay Period Type* to reveal the *Show Pay Periods* button (bottom of screen). Use *Show Pay Periods* to see how the periods cascade through the year. If needed, change the *Start Date* (click *Save*) and use *Show Pay Periods* again, until they are appropriate for your situation.
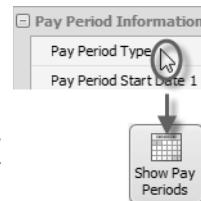
   d. If you pay twice a month select a *Start Date 2* and click *Save* (otherwise ignore this setting). This is the date your second pay period began.

   Example: If your first pay period ran from the 1st to the 15th, your second pay period would start on the 16th.

Custom Pay Periods: Choose "Custom" if your pay periods do not fit a standard pattern. Search ProcareSupport.com for article KB0177.

e.   Scroll to the *Overtime Calculations* section and choose whether overtime is based on 8 hours per day, 40 hours per week or both.

Pay Codes / Job Title

Pay Codes are used to describe the type of work a person does or position they hold like director, assistant director, head teacher, assistant teacher, etc. You'll also include benefit categories like vacation, sick, training and so forth.

1.   From the *Procare Home* screen click *Configuration > System.*

2.   Go to *Accounting Management > Employee Data >* dbl-click *Pay Codes.*

3.   To create a new Pay Code:

a.   Click the top (blank) line and enter a *Pay Code Name* like "Admin Assistant".

b.   Assign it to an expense account number from your Chart of Accounts (page 52) like "5050.00 Payroll - Administration".

c.   If this position qualifies for overtime, pay place a check in the *Pay OT* box. In most cases the *Active* box should also be checked.

d.   Tap *Enter* (on your keyboard) until a new blank line appears and continue adding new *Pay Codes*.

4.   Use the *Up & Down* arrows to change their order as needed, then click *Save > Exit*.

Benefit Codes

Select items which are benefits from your list of Pay Codes such as vacation, sick, holiday, etc.

1.   From the *Procare Home* screen click *Configuration > System.*

2.   Go to *Accounting Management > Employee Data >* dbl-click *Benefit Codes.*

3.   To create a new Benefit Code:

a.   Click the top (blank) line and select an existing *Pay Code* from the list like "Vacation".

b.   Enter the percentage at which benefits for this pay code are calculated, for example 100%.

c.   If you'd like this benefit to be included on payroll check stubs, place a check mark in the *Check Stub* box (requires Payroll module).

    d.   Tap *Enter* (on your keyboard) until a new blank line appears and continue adding new *Benefit Codes*.

4.   Use the *Up & Down* arrows to change their order as needed, then click *Save > Exit*.

Employment Status

"Currently Employed" is the status you'll use for all staff members you presently employ. Create additional status levels to cover time periods when they are not employed such as: laid off, leave of absence, quit, fired, etc.

1.   From the *Procare Home* screen click *Configuration > System.*

2.   Go to *Data Management > Status & Relationships >* dbl-click *Employee's Employment Status.*

3.   To create a new status click the top (blank) line and enter a *Description*, like "Laid Off - OK to rehire". Include a *Comment* (optional) if the status requires further explanation, then click *Save*. Continue adding new Employment Status descriptions clicking *Save* after each one.

4.   Use the *Up & Down* arrows to change their order as needed, then click *Exit*.

Employee Relationships

Relationships are used to explain how different people are connected to each employee; for example, it may be a family member, like a spouse or child, etc. Other people outside the family, like emergency contacts, the employee's doctor, or a second employer, may also be connected to them.

1.   From the *Procare Home* screen click *Configuration > System.*

2.   Go to *Data Management > Status & Relationships >* dbl-click *Employee Relationships*.

3.   To create a new Relationship click the top (blank) line and enter a *Description* like "Family Friend" with a *Comment* (optional) if it requires further explanation, then click *Save*. Continue adding new Relationship descriptions clicking *Save* after each one.

4.   Use the *Up & Down* arrows to change their order if needed, then click *Exit*.

Tracking Items & User Defined Fields

Tracking Items are categories you create that may apply to many employees while *User Defined Fields* are better for information specific to a single person. For example, to track which staff members have up-to-date CPR certification use Tracking Items, but to record the exact date they received the certification create a User Defined Field. If a certification must be tracked on a recurring basis (like every 12 months) it may preferable to use the "requirements" section of *Immunizations & Requirements* instead.

Tracking and User Defined Fields are explained in detail in the Family Data portion of this guide (page 23).

Immunizations & Requirements

Set up your *Immunization Schedule* and any other date based *Requirements* needed for your state, county or other authority as explained in the Family Data portion of this guide (page 26).

Phone Number Types, Log Sheets, Misc.

You may wish to set up miscellaneous items such as the types of phone numbers (home, work, cell) and log sheets (scheduling, staff review, disciplinary). These items are also explained in the Family Data portion of this guide (page 28).

Employee Information

Now that you've set up the basic *System Configuration* settings you're ready to begin entering employees.

Enter an Employee

1. From the *Procare Home* screen click the *Employee Data & Payroll* tab.

2. Click the *Add Employee* icon, with the plus (+) sign, on the employee toolbar. To add someone already in the system click the tiny down arrow and choose *Add Existing Person*. For example you may have already set them up as a Procare User.

Learn more about *New & Existing* persons. See page 12 sidebar.

Learn about deleting an Employee. Search ProcareSupport.com for article KB0132.

3. Enter data on the *Person Information* screen.

   a. Enter the name, DOB, gender, email, etc., as desired. The only required fields are first & last name.

   b. Under *Address Information* click *New* and enter their address, then click *Save*. You may enter more than one address, just click *Save* after each one, then click *Exit* to return to the *Person Information* screen.

   > Hint: To change an existing address or phone number dbl-click anywhere in the address or phone box.

   c. Under *Phone Information* click *New*, choose a *Telephone Type* (like home or cell) then enter the *Area Code* and *Telephone Number* and a *Comment* (optional) then click *Save*. You may enter more than one phone number, just click *Save* after each one, then click *Exit* to return to the *Person Information* screen.

   d. To add a *Photo* see page 41.

4. Once the basic information for this person has been entered click *Continue* (lower right).

5. If anyone with a similar name, address, or phone number is found, the *Person Reconcile* screen will appear (page 30). If no match is found, you'll automatically return to the main screen of Employee Data with your new person displayed under the list of *Employees* (left side).

Edit Employee Information

Selecting an Employee: If you have just added an employee, they will already be selected (their name will be highlighted). To work on a different employee you'll need to look them up (page 120).

To add or change basic information for an employee (like name, address, phone or email):

1. Select an employee (see sidebar).

2. Dbl-click their name or address on the Employee Summary portion of the screen.

3. Make any changes, then click *Save > Exit*.

Employee Summary

ANDREWS

Employee - Loretta Andrews

2377 SE Caruthers St.
Portland, OR 97214

Assign a Work Area, Location & Related People

1. Select an employee (see sidebar).

2. Click the *Information & Relationships* icon on the toolbar.

Information & Relationships
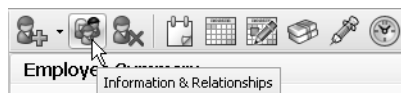
3. Select a *Primary School* (location) and *Primary Work Area* for this person (upper right).

    Note: If the person is no longer employed, mark them as "hidden".

4. Next, add related people (optional).

    a.   Add people connected to this employee such as a spouse, child, emergency contact, doctor, etc. Click the tiny arrow on the *Add* button and choose either *Add New Person* or *Add Existing Person* if the person is already in your database (they may be a person already set up in Family Data, etc.).

    b.   Choose how each person is related to the employee from the *Relationship* list (like spouse, child, etc.).

5. Click *Save > Exit.*

Work History, Hire Date, Employment Status

Assign each employee a *Hire Date* and *Employment Status*.

1. Look up an employee (page 120).

2. Click the *Work History* icon on the toolbar.
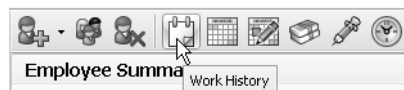
Hint: An employee may be assigned more than one *Employment Status*, each with its own date. For example they may have been hired, then were away on leave and later returned.

To create your own status levels see page 110.

Length of Employment: Hold your mouse over the status at the main screen of Employee Data to see how long they've been at their current status. You may also print *Employment Status* reports. See article KB0211 at ProcareSupport.com.

3. Select a *Date* and a *Status* like *Currently Employed* and click Save.

4. Enter any additional dates and levels you know at this time (clicking *Save* after each one), then click *Exit* (see sidebar hint).

Tip: See sidebar for length of employment.

Staff Schedules & Benefit Hours

Set up a schedule for each employee, then factor in planned absences (like vacation).

Assign Schedules to an Employee

1. Look up an employee (page 120).

2. Click the *Schedule* icon (monthly calendar) on the toolbar.
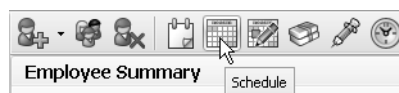
3. Click *New*. A blank *New Schedule* appears.

   a. Enter a *Schedule Name* such as summer, fall or anything you like.

   b. Enter *Start* and *End* dates for this schedule (top right).

   c. On the first (blank) line select the *Pay Code*, *Work Area, Day* and *In / Out* times.

   d. Tap *Enter* (on your keyboard) until a new blank line appears. Continue adding additional days or use *Copy Day* to repeat information from the prior day.

   Hint: Use the *Spacebar* to quickly enter time like 8 [spacebar] 30 [spacebar] A for 8:30 AM.

Multiple Schedules: An employee may be assigned more than one *Schedule*, each with its own *Start* and *End* dates.

4. When finished click *Save > Exit.* You'll return to the *Employee Schedules* screen.

5. Click *New* to add additional schedules or dbl-click an existing schedule to make a change. When finished click *Exit*.

Planned Absences (Vacation) and Benefit Hours
Record days a staff member will be away and track benefit hours they have earned and used.

1. Look up an employee (page 120).

2. Click the *Benefits* icon (calendar with pencil) on the toolbar.
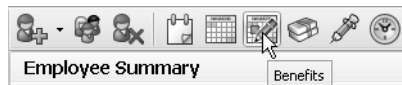
3. Enter any planned absences on the *Planned* tab. These absences will be automatically reflected on the employee's schedule (see sidebar about the *Review* button).

4. Track benefit hours earned on the *Earned* tab. These hours may be posted as a batch to all employees at once (page 119).

5. The *Used* tab automatically displays any benefit hours from the Time Card (page 117).

> Hint: Things like paid holidays and planned vacation hours may be *Batch Posted* to the Time Card and will then appear on the *Used* tab (page 118).

6. Look at the *Balances* tab to review time earned, used and the balance remaining.

7. Click *Save > Exit.*

Use *Review* to see or *Print* schedules. For details see sidebar page 37.

Use Group to sort Benefit Hours by category like Vacation, Sick, Training, etc.

Pay Rate

Assign a Pay Code like "Teacher" along with a salary or hourly rate to each employee.

1. Look up an employee (page 120).

2. Click the *Pay Rate* icon on the toolbar.

3. Set this person up as a salaried or hourly employee or both. You must use a different *Pay Code* for each type of pay.

   a. For salaried employees select a *Salary Pay Code* and enter the amount they receive *Per Pay Period*.

   b. For hourly employees select a *Pay Code* and enter their *ST Rate* (straight time) and *OT Rate* (overtime). Check the *Benefit* box next to the Pay Code used to pay out benefits. This is used to determine the amount per hour they are paid for benefit hours like vacation and sick time.

   > Note 1: If they have just one Pay Code, be sure to check the Benefit Box. If they have multiple Pay Codes (like "Teacher" and "Aide"), check the box next to the appropriate rate. In other words, determine if they will be paid for vacation, sick, etc., at the "Teacher" rate or the "Aide" rate.

   > Note 2: To assign multiple rates to the same person, tap *Enter* until a new blank line appears.

4. Click *Save > Exit*.

Staff Immunizations & Requirements

Record dates an employee received each immunization or other date based requirement. Immunizations for staff members work the same as for children. See page 38.
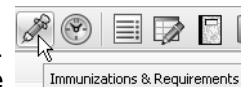
Tracking Items for Employees

You may assign *Tracking Items* to each employee. *Tracking Items* work the same in all modules. See page 39 (family tracking).

Employee Tracking Items may be used for things like: CPR certification, whether they are full time, part time or a volunteer and as a checklist for completion of required forms or paperwork.
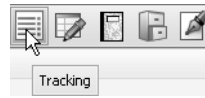
User Defined Fields for Employees

Enter data in *User Defined Fields* for each employee as needed. These fields work the same in all modules. See page 39 (add fields to families).

What are *User Defined Fields* used for? Anything specific about an employee that doesn't already have a place in Procare, for example, a date you need to record beyond the hire date and date of birth.
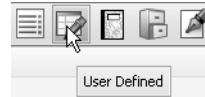
Log Sheets for Employees

You may type notes in the *Log Sheet* of each employee as needed. Log notes work the same in all modules. See page 39 (add logs to families).

Attach a Document to an Employee

Attach files in .pdf format to keep an electronic paper trail of important documents related to each employee - for example a copy of a purchase agreement, contract, etc. For details search ProcareSupport.com for article KB0220.

Letter Merge / Word Processor

Use the Letter Merge feature to print or email letters to your employees and insert fields like the company name, address, etc. Letter merge works the same in all modules. See page 43 (family letter merge).

Email & Text Messages

You may copy email addresses for use outside of Procare or choose one of several ways to send email or text messages through Procare (page 43).

Employee Time Cards

Use the Time Card to view an employee's clock in times or make manual entries and corrections.

1. Look up an employee (page 120).

2. Click the Time Card icon (clock) on the toolbar.

Hint: Quickly repeat information. Click on a new blank line then click *Copy Day* or *Copy Week*.

Time Card Color Coding: Yellow lines indicate the current pay period, while blue lines show the previous pay period, and all other times have a white background.

If an employee works at two or more locations see article KB0142 at ProcareSupport.com for how to handle time cards.

3. To enter a new line, the previous line must have both a *Time In* and *Out*. If the person is currently checked in, use Batch Post Time Card (see below) to add an entry for a previous day (for example, if they were sick).

    a.   Click the bottom (blank) line and select a *Pay Code* and *Work Area*.

    b.   Confirm the *Date In* and *Time In* which default to the current date and time. Make changes as needed.

    c.   (Optional) If you're ready to add check "out" information, click or tab to the *Date Out* and *Time Out* (which default to the expected date and current time). Make changes as needed.

    d.   Click *Save*.

4. If the line just entered has both a *Time In* and *Out* you may continue adding additional lines clicking *Save* after each one.

5. When finished click *Exit* (see sidebar for color coding).

Audit Time Card Changes

Use the *Audit* button to view a history of all changes on the Time Card.

Show Rounding / Show Actual

Click *Show Rounding* to see in / out times rounded, then click *Show Actual* to toggle back to the exact time. Rounding may be set by a System Supervisor at the Regions & Schools *Options* screen. Search ProcareSupport.com for article KB0030.

Batch Post Time Card

Record hours on Employee Time Cards for things like paid holidays, or when manually entering hours based on staff schedules, or to process planned benefit hours (like vacation time) that have been taken. Batch Post Time Card can also be helpful when a person is currently checked in and you need to enter time for a previous day.

1. At the main screen of Employee Data & Payroll click *Functions > Batch Post Time Card*.

2. Include persons *Employed As Of* the date you specify.

3. Choose whether to:

    a.   Use the *Primary Work Area*.

        Choose a *Pay Code* like "Holiday" that will be used for everyone. Choose a *Date, Time In* and *Time Out*. This will give them "Holiday" hours for their normal work area like Toddlers.

b.   Or, base hours on the *Schedule.*

Choose to include people scheduled for *All Pay Codes* (default) or one particular code, then pick the *Date* to use from the schedule.

c.   Or record hours for *Planned Benefits.*

Choose a *Pay Code* like "Vacation" and select a *Start Date* and *End Date*. This will include only people who have that code entered as a *Planned Benefit* (page 115) during the specified dates.

4.   Click *Next* to display employees who meet your criteria and are eligible for this procedure (see sidebar).

5.   Select the employees to include. Place a check in the column header to select them all.

6.   Make any necessary changes to the *Time In* and *Time Out* for individual employees.

7.   Click *Process*, then *Exit*.

Batch Check In/Out

Use the *Batch Check In/Out* feature to check selected groups of employees in or out, such as those who arrive or depart at the same time. You'll also use this feature at the end of each day to check out anyone who forgot to check out. This is very similar to batch check in of children (page 85). Search for article KB0138 at ProcareSupport.com.

Batch Post Accrued Benefits

The accrued benefits feature lets you quickly calculate and post hours earned for vacation, sick time, etc. to the Benefits screen of each employee. See article KB0131 at ProcareSupport.com.

Employee Check In

Get a Registration Number

Each person will be assigned a random number they'll use to register at the check-in computer in order to begin checking in and out. This is a temporary number they will use just once. You may generate a registration number for one particular person (described below) or for everyone at once (see sidebar hint).

1.   Look up an employee (page 120).

2.   Click the *Information & Relationships* icon on the toolbar.
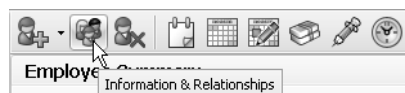
To be eligible for *Batch Post Time Card* an employee must be "Currently Employed" (page 113) as of the specified date.

Control Overtime: Restrict staff check-in times to their scheduled hours. Search ProcareSupport.com for article KB0478.

Hint: Create Registration Numbers for all employees at once. From the main screen of Employee Data go to *Functions > Temporary Registration.*

Then print a report showing the numbers. Go to *Reports > Standard Reports > Employee Data > Registration > Temporary Registration.*

3. Click the *New Register* button to generate a temporary Registration Number for this person.

    Note: The Registration Number is valid for 7 days. After that just repeat these steps to generate a new one.

4. Give this Registration Number to the employee. Have them use their number to register at the check-in computer (page 92).

Look Up, Search and Filter Employees

Once your employee information has been entered you'll want to know how to look up or search for a person and use the filter feature to view only certain staff members.

Employees are sorted alphabetically. Change to reverse order by clicking the *Name* heading at the top.
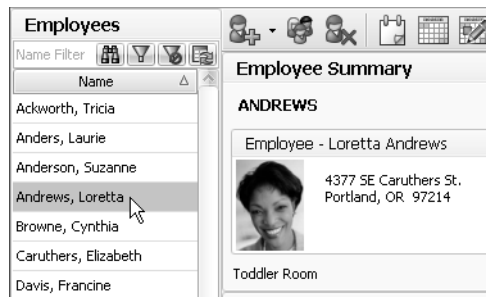
Look Up an Employee - The "Employee List"

The easiest way to look up an employee is to use the list of *Employees* on the left side of the screen. Staff members are listed alphabetically by last name (see sidebar).

1. Type the first few letters of their last name in the *Name Filter* box (upper left) just above the list of employees.

2. Click once to select the employee you wish to work on or dbl-click their name to open the *Employee Information* screen.

Search for a Person at *this* Location

1. Click the *Search* button (binoculars) on the toolbar.

2. Choose the type of thing you want to find (employee name, address or phone).

3. Type in the item for which you are searching (the person's name, address or phone) and click *Find*.

4. Dbl-click the person's name in the *Results* to go to their screen.

Search for a Person across *all* Locations

If you have multiple locations, you may search all locations at once (page 42).

Filter Your Employees

1. To view only certain types of employees on screen click the *Filter* button (looks like a funnel or coffee filter) on the toolbar.
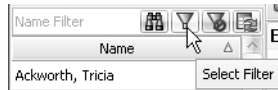
2. Choose whether to include *All Employees* or just *Visible* or *Hidden Employees*.

3. Pick categories of employees to include. You may combine multiple categories.

   Example: All staff members with an *Employment Status* of "Currently Employed" as of today whose *Primary Work Area* is the Toddler Room.

4. Click *Count* (optional) to see how many employees meet your criteria.

5. Click *Exit*. Only employees that meet your criteria will be displayed and the filter will turn red (see sidebar).

6. To clear your filter and return to the default settings for your location, click *Clear Filter* (with the red circle/slash) on the toolbar.

   The *Default Filter* is set as part of Region & School Options. Search ProcareSupport.com for article KB0202.

Hidden Employees are displayed in *italics*, but you'll only see them if your filter is set to include *All Employees* or *Hidden Employees*.

A Red Filter means only certain employees are currently displayed.
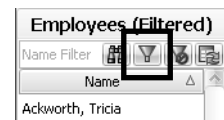
Refresh the List

Sometimes you may wish to click the *Refresh* icon to be sure you are viewing a current list of people who should be included in your filter. This makes sense if you have other people entering employees into Procare or making changes from another computer.

   Example: Four employees are displayed based on your filter. Someone else makes a change to another employee so they would now be part of your filter. You may not see the fifth employee right away - until you click *Refresh*.

Combined Reports: If you have multiple locations (hosted in a single database), you may print certain types of combined or "corporate" reports that include information from all locations. See article KB0207 at ProcareSupport.com.

Employee Data Reports

Employee Data Reports work in a way similar to Family Data Reports. See page 48 for the basics. To learn more about particular reports, search ProcareSupport.com for article KB0211.

Doing Your Own Payroll

Learn to use the optional Payroll module. See article KB0530 at ProcareSupport.com.

Procare Getting Started Guide

Index

Procare Software

Solutions for Child Care Management

Software Modules

Family Data
Maintain all family and child information.

Family Accounting
Detailed management of center revenue.

Agency Accounting
Advanced management of agency payments.

Attendance Tracker
Time and attendance for children.

Meal Tracker
Generate menus and calculate meals served.

Activity Manager
Manage activities, classes, camps or programs.

Employee Data
Maintain employee information.

Payroll
Calculate and print payroll checks.

Expenses and Ledger
Track expenses, budgets, financial reports.

Services

Tuition Express
Tuition payment processing service.

Procare Cloud
Access your secure data from the cloud.

MyProcare
Parent portal and online registration.

KidReports
Engage parents. Empower teachers.

Seats
A Seat is required for each person signed into Procare at the same time.
Family Data includes two seats, Attendance Tracker includes one seat.
A check-in computer uses one seat.