

Setup (One-time actions)

1 Center Setup

In iCare Admin go to *Setup* >> [Get Started](#) and fill the following tabs:

- General Information and Center Hours
- [Rooms/Programs](#) (Examples: Grade1 and Grade2)
- [Recurring Billing](#) (if using automated recurring billing)
- [Business Model](#) (This page is written for the monthly scheduling model; if you use a weekly model please see the 'how-to' page for centers)

In iCare Admin go to *Setup* >> [Parent Portal Setup](#) and set up:

- Incoming and outgoing email accounts
- Your preferences for the parents

2 Afterschool Setup

To set the following options go to *Setup* >> *Advanced Setup* and the [Afterschool Care Options](#) tab.

- To set the [scheduling/attendance options](#) – for example, AM, PM, Half-day and Full-day – and their start and end times: click on Edit and then click on Set Attendance Type Options button.
- To automatically convert clocked (real-time) attendance to your scheduling/attendance options, check the box, Auto-fill (FTPT) attendance through dayending using time-clock data.
- To set different scheduling/attendance options for different days use the section, *Setup Special Day Overrides*.
- To set the billing rates: click on the [Set Billing Rates](#) button and set your rates by adding a new row for each Attendance Type.
- Enter your holidays and school closing and school half days in the [Holidays and Special Days](#) tab.
- To set automated billing, in the [Billing Options](#) tab, check the checkbox titled 'Post type-based (FTPT) charges for scheduled days'.
- To make parents prepay when scheduling their children: go to *Setup* >> *Parent Portal Setup* and the *Parental Settings* tab. Check the checkbox titled '[Make parents pre-pay](#) for afterschool care scheduling'. If you choose this option then the automated billing is not needed.

For more advanced settings see [KB article 1721](#).

3 Invite Parents to the Parent Portal

Give the URL for [Parent Portal](#) to all the parents. Additionally, display the link on your website. On the Parent Portal parents can:

- Enter [child and family data](#)
- Enter [children's schedules](#)
- Pay online
- Read and respond to notes and [messages from teachers](#)

Alternatively: You can enter children and schedule them yourself in iCare Admin. Enter child/family data and choose a Program/Room from *Children >> [Family Data](#) >> Add*. Then, choose the child's Schedule from *Children >> Fee and [Monthly Scheduler](#)*. You can now invite parents to the Parent Portal via [email from iCare](#).

4 Enroll Staff

Enter all staff in iCare Admin through [Staff >> Data](#) >> Add.

5 Set Up iCare Lobby to Record Attendance

Set up an [iCare Lobby](#) kiosk using a PC, Mac, laptop or tablet in the lobby. You can use it for the following:

- Have parents and staff [check-in and out](#).
- [Read messages](#) and answer [RSVP questions](#).

You can also create [lobby passwords](#) for [batch check-in](#) for *programs, classes and busses*.

6 Set Up Payment Processing

Set up a Merchant Account, and ask parents to view their account statements and make payments through Parent Portal.

Everyday Things

Check Bills and Enter Payments

- Check family and subsidy account statements to see if recurring bills are populating as expected. (*Accounting >> [Accounts](#)*)
- If not using Parent Portal for online payments, then enter payments through the single or batch payment entry forms. (*Accounting >> [Payments](#)*) (*Accounting >> Payments Drop-Down >> Enter [Batch Payments](#)*)
- Enter Miscellaneous Charges or Credits through *Accounting >> Account Register*.

Enter Children's Daily Activities and Development Notes

- Enter children's activities and development notes. (*Children >> Family Data >> [Child Notes](#) link in the footer*) (*Left Panel Child List >> Right-click >> [Enter Note...](#)*)
- Note: parents can read the notes and respond to messages through the Parent Portal.

Quick Tips

SMS/Email

- Send SMS text messages or emails through *Left Panel Child List >> Right-Click >> [Send SMS or Email](#)*
- From any report, right-click on a child or family member and choose *Send SMS or Email*

Alerts and Notifications

- **Automatic Alerts to Parents or Administrators:** Set automated alerts – like overdue balance, immunization shots or last physical – to be sent by SMS or email. (*Message Center >> [Alerts Setup](#)*)
- **Parent Portal Notifications:** Get notified when parents enroll children or update schedules online through Parent Portal (*Setup >> [Parent Portal Setup](#)*)

Reports

Commonly Used Reports

- **Children’s Schedule Report** (*Children >> Fee and Schedule Drop-Down >>...*)
- **Staff Schedule Report** (*Staff >> Schedules Drop-Down >> Weekly Schedule Report*)
- **Children’s Attendance Report:**(*Children >> Attendance Drop-Down >> Attendance Reports >> Attendance Report*)
- **Staff Attendance Report** (*Staff >> Attendance Drop-Down >> Attendance Payroll Hours Report*)
- **Account Balances** (*Accounting >> Accounts Drop-Down >> Account Balances*)

Report Tips

- **[Modify Filter](#):** Allows you to filter the time period or any column in the report.
- **[Excel](#):** Export all data directly to Excel.
- **[Related Reports](#):** Allows you to quickly find related reports.
- **[Views](#):** Use the tabs to switch between Working View and Printer View.
- **[Right-Click](#):** Right-Click on any cell in the Working View for Accounting, Messaging or Mathematical actions